



# Grande Spirit Foundation BUSINESS PLAN

2020-2022

*Alberta*  Seniors and Housing

April 2019

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## EXECUTIVE SUMMARY

Grande Spirit Foundation is respected locally and provincially for providing safe affordable housing to area residents for over 55 years. Originally established as a non-profit organization in 1960, Grande Spirit Foundation (GSF) has been recognized as a Regional Public Housing Management Body under the Alberta Housing Act since 1994.

Representing 12 municipalities with a Board of Directors made up of mayors, reeves and councilors, Grande Spirit Foundation owns and manages five seniors' lodges along with various seniors' apartments and family housing units throughout communities in our region. GSF also provides rental subsidy programs targeted to families and individuals of modest income on behalf of the province of Alberta. GSF is proud to provide affordable housing options as well as supported housing for senior citizens unable to live independently.

GSF is guided by our values:

- we believe everyone should be treated with dignity, compassion and respect;
- we aspire to the highest standard of integrity, honesty and professionalism;
- our common-sense approach encourages a positive, safe environment for all staff, residents and visitors.

The Grande Prairie area is made up of vibrant, growing communities, with diverse industries including Forestry, Agriculture and Oil & Gas. A thriving economy creates pressure on housing capacity in all areas, and a depressed economy increases the need for affordable housing. It is extremely difficult to respond to this continual demand for housing for all sectors.

Over the years GSF has built a reputation for providing quality, affordable housing and services. As a non-profit housing provider, our responsibility is to our clients and our funders, not to shareholders. This allows the Foundation to maintain affordable rental rates and ensures Albertans are being served. Additionally, the Foundation is very proud of its knowledgeable, experienced staff. Their dedication and commitment to the residents and their families is evident by the

positive and home feeling atmosphere in our facilities.

We have a well-developed Certificate of Recognition (COR) Health and Safety program that is recognized province-wide with a strong reporting system that allows GSF to continually ensure high levels of safety for all staff and residents in our facilities.

GSF holds Alberta Health Compliance and Monitoring licensing in all our Seniors Lodge facilities. Staff work closely with provincial inspectors to ensure we are above the grade required.

Our Board of Directors ensures operations are guided by comprehensive policies and procedures. Our staff are proficient with our locally supported administrative systems. Seniors in our lodge facilities have access to 24-hour supports from Alberta Health Services through Home Care. Partnerships are established to develop long term relationships with community agencies, vendors, contractors, professionals, and stakeholders and we hold strong support from both municipal and provincial levels of government.

For 2019, a Need and Demand Analysis for our entire regional area is a priority project that will review both seniors and family housing needs within GSF's area as a region. This report is expected to pave the way for future projects and business plans and support future projects in our area. A previous needs assessment, completed in 2013, reinforced the urgent need for additional affordable housing in the area. This analysis identified over 12,000 people in the Grande Prairie area would become seniors over the next 5-15 years. A further needs analysis completed in 2017 in the Spirit River regional area reconfirmed this data.

In 2018 GSF submitted a business case to the province for a new senior's facility in Spirit River to replace the 50-year-old Pleasantview Lodge and to add assisted living units. In early 2019, the provincial government announced "\$24 million is approved to replace the existing Pleasantview Lodge with a new facility that includes 52 designated supportive living and 40 lodge spaces". We are excited about this project and looking forward to starting as soon as possible.

GSF also manages Amisk Court. A provincially-owned, 60-unit senior's self-contained apartment in Beaverlodge that offers an optional mid-day meal to residents Monday through Friday. The town has many supports including an 18-bed acute care hospital and current plans for a new hospital. Amisk Court is the only seniors' facility in Beaverlodge and, due to its age and varied building weaknesses combined with a needs assessment that indicates seniors housing demands are high for the area, GSF has Amisk listed as a high priority capital renewal project with a request to add more new lodge units and replace a section of the old building. Amisk can also be considered for assisted living, of which would assist reducing the high demands for this support level that is currently pressuring the Grande Prairie area.

The affordable housing demand within the City of Grande Prairie continues to be at issue with GSF holding over 300 on our waiting list for family housing. Although GSF manages an annual rent supplement budget of over \$3 million on behalf of the province of Alberta, the economic challenges of our area make it difficult to maintain adequate rent supplement numbers. The City of Grande Prairie has purchased an 11-acre parcel of land that is designated for affordable housing development and has recently offered access to 5 acres to GSF. The City is currently updating their Housing Master Plan and is expected to assist identifying housing needs for the City. GSF will be collaborating with the City of Grande Prairie within our 2019 needs assessment project to determine immediate and long-term needs and future project potential for this site.

GSF is moving forward with replacement of family housing units in the Town of Sexsmith. The units are over 30 years old and approved by the province for surplus. The old units will be sold and replaced with a new six-unit facility providing updated systems and efficiencies that support reduced expenses and maintenance inputs.

GSF is has also engaged within DeBolt developing plans to move two Seniors Self Contained units to new lands. The two four-unit buildings require moving due to erosion issues that have persisted over the past 15 years. The issue forced closure

of both buildings, leaving DeBolt with no senior's facilities. GSF is proceeding with the project in hopes of having units available in 2019 or 2020.

Grande Spirit Foundation will change substantially over the next five years as demand for more facilities continues. We are confident the provincial government will develop a long-term real estate plan that will assist us in divesting of properties that no longer meet the needs of our communities or clients. We'll be called on to address the needs of the senior population in the Beaverlodge and Spirit River areas to ensure they are able to enjoy their senior years in their community while the City of Grande Prairie will draw on our expertise as they move forward to address the affordable housing needs of the City. Through all, Grande Spirit Foundation will continue as a leader in providing affordable housing to residents in vulnerable sectors.

## ACCOUNTABILITY STATEMENT

The business plan was prepared under the Board's direction in accordance with legislation and associated ministerial guidelines, and in consideration of all policy decisions and material, economic, or fiscal implications of which the Board is aware. This plan is provided openly to the public through different access such as our GSF website and through our member municipalities.

## PORTFOLIO PROFILE

The Grande Spirit Foundation “GSF” is a Housing Management Body of the Alberta Government under Ministerial Order #H:091/94. The Grande Spirit Foundation is led by a 12-member Board comprised of one representative from each of its contributing member municipalities. GSF operates in Grande Prairie, Spirit River, Beaverlodge, Sexsmith, Rycroft, Wanham, Eaglesham, LaGlace, Wembley, DeBolt, Clairmont, and Bezanson.

GSF’s mandate is to provide safe, affordable housing and support services to low income seniors, families and individuals. Our mission statement:

**“We serve seniors, families, and individuals by providing quality affordable housing.”**

- GSF owns and operates 5 lodges with 427 rooms.
- GSF manages Alberta Social Housing Corporation (ASHC) owned facilities;
- 15 senior apartment buildings with 278 suites,
- 63 direct rental family housing units.
- We currently administer \$3 million annually through provincially funded Rent Supplement Programs.
- GSF manages a 70-unit affordable building and 17 wheelchair accessible rent geared to income (RGI) units for local non-profit group, Grande Prairie Residential Society.
- Grande Spirit Foundation also manages a 40-unit affordable housing building for the City of Grande Prairie. This facility was constructed through an affordable housing grant as well as revenue from the sale of properties that had been transferred from the Province to the City. The City of Grande Prairie serves as the community-based organization (CBO); Grande Spirit Foundation plays an active role as member of the Community Advisory Board on Homelessness.
- Major Capital accomplishments include
  - two additions to Wild Rose Manor; 25 units in 2003, and 16 units in 2010
  - 24-unit expansion to Amisk Court, an ASHC owned senior’s apartment in Beaverlodge, completed in 2011.
  - “Lakeview” in Clairmont with 150 units opened in 2017, increasing capacity by 72 lodge units and 78 senior apartment units.
  - High speed fibre installation at four of our seniors’ lodges



## INSTITUTIONAL CONTEXT

- Friends of the Foundation
- Alberta Seniors and Housing
- Alberta Health Services – Home Care
- Grande Prairie Volunteer Services Bureau
- Chamber of Commerce
- Rotary Club of Grande Prairie
- City of Grande Prairie
- County of Grande Prairie
- MD of Greenview
- Saddle Hills County
- Birch Hills County
- Town of Spirit River
- MD of Spirit River
- Town of Sexsmith
- Town of Beaverlodge
- Town of Wembley
- Village of Hythe
- Village of Rycroft
- AISH
- Grande Prairie Residential Society
- Grande Prairie Seniors Outreach
- WCB
- CUPE
- CCSA
- Municipal Affairs
- Hythe & District Pioneer Homes Advisory Committee
- Mountain Plains Community Services Society
- Center Point Facilitation
- Heart River Housing
- North Peace Housing Foundation
- The Evergreens Foundation
- APHAA/ANPHA
- RMA/AUMA
- ASCHA

## PLAN DEVELOPMENT

- This plan is developed in requirement for GSF policy and Alberta Seniors and Housing requirements for HMB's.
- General Manager received business plan templates from Alberta Seniors and Housing in 2019.
- In March/April 2019, GSF staff, together with a consultant, completed the SWOT analysis attached with this plan.
- GSF staff completed this 3-year Business Plan developed from May to June, as per Alberta Seniors direction.
- In May 2019 staff and board members completed a 3-year strategic plan.
- A review of this business plan was further completed by GSF board in May and June of 2019 and approved for submission to ASH.
- Further items supporting development of this plan include:
  - Needs and Demand Analysis in 2013.
  - GSF Portfolio Advisor and Capacity Development personnel attended our joint senior management and Board strategic planning session in May 2014. The Grande Spirit Foundation 2014-2017 Strategic Plan was ratified by the Board in October 2014. This plan reviewed in May 2019.
  - In August 2015, we contracted EmPower Up! Consulting to prepare a Needs and Demand Analysis for the Beaverlodge/Wembley areas. Plan indicated a need for more unit in Beaverlodge.
  - In 2017/18, Bennett completed architectural drawings for upgrades to Amisk Court. This would be a two-story addition that would add 29 lodge units to the already existing structure to support the Beaverlodge/Wembley Needs Analysis.
  - In 2017 a needs analysis for Spirit River was completed that indicated the need for higher levels of care. A business case and architectural drawings are also completed and submitted in 2018 in support of this project.
  - In 2017 the Board declared six (6) family houses in Sexsmith surplus to be replaced with multifamily. A business case completed in 2018 and submitted.
  - In 2017 Gordon and Associates were contracted to complete the 2018 Spirit River Seniors and Supportive Living Facility Business Case.

### BOARD MOTION(S)

**RESOLUTION #2433 – Moved by J. Kokotilo-Bekkerus to approve the amendment to the Grande Spirit Foundation 2017 Business Plan for the inclusion of a new senior's facility in Spirit River and to resubmit to the Province.**

**CARRIED**

**RESOLUTION # 2434 – Moved by E. Garrow to accept the Grande Spirit Foundation acting as lead for the Seniors Assisted Living Facility in the Central Peace Region. CARRIED**

**RESOLUTION # 2462 – Moved by A. Hubert to declare the following six (6) houses in Sexsmith, currently owned by the Province of Alberta, as surplus properties; 10121 99 Street, 9302 100 Avenue, 9601 91 Street, 9709 98 Avenue, 9716 91 Street and 9805 91 Street. CARRIED**

## ENVIRONMENTAL SCAN

- Grande Spirit Foundation has a history of more than 50 years in the area, and has an excellent reputation locally and provincially and is at the center of the Peace Region in Alberta, an area that provides service to over 250,000 residents
- Altogether, Grande Spirit Foundation manages over 1100 units, comprised of senior's lodge, seniors self-contained, social housing, affordable housing and rent supplement
- The 2016 Grande Prairie census shows a population of 63,166, almost 25% greater than the 2011 census of 55,032. The population increase between 2011 and 2016 was 13.5%
- The 2016 census for the City of GP and the County of GP shows 6525 people over the age of 65 and 8880 people between the ages of 55 and 65.
- In 2016 14% of owners and 30.3% of renters paid more than 30% on shelter
- The average house price in Grande Prairie in May of 2019 was \$306,295
- The one-bedroom Household Income Limit (HIL) for the Grande Prairie area is \$37,500 an increase of \$2,500 from 2017
- According to the 2018 Canada Mortgage and Housing (CMHC) Rental Market report, the 1-bedroom vacancy rate for Grande Prairie is 2.8% and the average 1-bedroom market rent is \$943
- The City of Grande Prairie completed a 10-year Affordable Housing Master Plan in 2011 and is currently working on updating this report along with an affordable housing strategy.
- GSF has established working relationships with private landlords and other special needs housing providers and provides management services for special needs buildings
- GSF has developed a long-term real estate strategy for our region, recommending the surplus of rural units that are an inappropriate size, have chronic vacancies and high operational costs
- The Town of Beaverlodge has expressed a desire to provide additional levels of seniors supportive living in Beaverlodge and GSF is providing the Needs Analysis and Architectural drawings for this facility within this business plan as submission to the province
- As required by ASH a SWOT analysis was completed in 2019 by Synergy Promotions.
- In 2018 the G5 group, made up of Saddle Hills County, Birch Hills County, MD of Spirit River, Town of Spirit River and Village of Hythe, approached the Grande Spirit Foundation about a senior's facility for Spirit River. GSF board has approved to take lead on this project and have completed a business case and architectural drawings within this business plan as

submission to the province (see attachments). The facility received provincial approval for \$24 million and will have 92 units that will be able to accommodate SL2, DSL3, DSL4 and DSL4D. This facility is intended assist with the housing shortage for the higher levels of care in this area.

- GSF board approved surplus of six (6) Sexsmith family housings houses and ASH has declared the properties surplus. GSF will be moving towards sale of the six houses and construction of a new family housing unit, requesting capital shortfall in this business plan to assist with the new build.
- 2019 Organizational Chart - Attachment 1
- 2013 Needs and Demand Analysis – Attachment 2
- Household Income Limit – Attachment 3
- CMHC 2018 Rental Market Report – Attachment 4
- May 2019 Portfolio Report – Attachment 5
- Long Term Real Estate Strategy – Attachment 6
- Beaverlodge/Wembley Needs Assessment and Bennett Architectural Drawings for Amisk Court – Attachment 7
- Grande Prairie Affordable Housing Master Plan [www.cityofgp.com](http://www.cityofgp.com)
- G5 Spirit River Needs Assessment – Attachment 8
- Letter from Minister of Seniors and Housing regarding new facility in Spirit River – Attachment 9
- Bennett Architect Concept Study for Amisk Court – Attachment 10
- GSF SWOT Analysis – Attachment 11
- DeBolt Manufactured Home Quote - Attachment 12
- Sexsmith Family housing Business Plan – Attachment 13
- Central Peace Region Seniors Supportive Living Facility Business Case – Attachment 14
- 2020-2023 Strategic Plan – Attachment 15

# GOALS, STRATEGIC PRIORITY INITIATIVES, EXPECTED OUTCOMES AND PERFORMANCE MEASURES

Goal	Strategy	Outcome
<b>Clients:</b>		
1. Enhance the range, quality, and availability of services for seniors	a. Increase housing capacity b. Improve recreational activities to promote wellness and life enrichment c. Development of supportive living units in Beaverlodge and Spirit River	<ul style="list-style-type: none"> <li>• Work with the new senior's complex which will increase capacity and support services by 25%</li> <li>• More participation in a broader range of activities</li> <li>• Seniors in the Beaverlodge and Spirit River areas to have access to appropriate housing and support services allowing them to reside in their community longer</li> <li>• Family housing (Sexsmith) has access to appropriate housing with new build</li> </ul>
2. Ensure the level of care that we provide matches the residents' needs	a. Ensure the criteria is well defined b. Enhance screening and assessment process including mental health of current and future residents c. Analyze service delivery methods d. Survey residents and families to determine expectations	<ul style="list-style-type: none"> <li>• Residents appropriately housed with their needs met</li> <li>• Training and abilities of employees appropriate for level of care provided</li> <li>• Higher resident and family satisfaction</li> </ul>
3. Strengthen relationships with agency partners	a. Improve relationship with Home Care b. Improve local agency support	<ul style="list-style-type: none"> <li>• Residents access appropriate supports to enhance quality of life</li> <li>• A more integrated process to meet resident needs</li> </ul>
<b>Capacity /Facilities:</b>		
1. Develop a capacity plan	a. Collaborate with the Province to determine viability of developing units	<ul style="list-style-type: none"> <li>• Continue to Reduce our senior waitlist</li> <li>• Reduced costs to the Province and re-profiling</li> </ul>

	<ul style="list-style-type: none"> <li>b. Continue to work with the province on long-term real estate strategy to address vacancies and cost to operate in rural areas</li> <li>c. Continue to impress upon Province the need for increased subsidy to address the unique challenges in our community</li> <li>d. Encourage partnerships to increase affordable housing unit's capacity</li> <li>e. Investigate alternate use and/or repurposing of outdated facilities as well as mixed use for new and existing facilities</li> <li>f. Renegotiate PLRS agreements</li> </ul>	<p>dollars into more appropriate housing</p> <ul style="list-style-type: none"> <li>• Provincial budget for subsidy programs meets community needs</li> <li>• City of Grande Prairie collaboration with GSF for new affordable development</li> <li>• Increase our capacity and our revenue stream</li> </ul>
<p>2. Upgrade, update, maintain housing facilities</p>	<ul style="list-style-type: none"> <li>a. Complete fire &amp; safety upgrades in senior's lodge facilities</li> <li>b. Explore options on sprinkler installations and other needed upgrades in seniors self-contained units</li> <li>c. Look at mechanical upgrades to newer advanced technology systems</li> <li>d. Address wiring, asbestos, mold in some facilities</li> <li>e. Make units more "senior friendly" during upgrades</li> <li>f. Evaluate smoking in our facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Facilities are safe, compliant and suitable for all residents</li> </ul>
<p>3. Assess emergency response</p>	<ul style="list-style-type: none"> <li>a. Continue to work with Safe Communities around crime prevention</li> <li>b. Review emergency preparedness including possibility of pandemic</li> </ul>	<ul style="list-style-type: none"> <li>• Confident that we can successfully meet the challenge of any crisis</li> </ul>

<b>Financial Goals/Objectives:</b>		
1. Continually improve fiscal sustainability	<ul style="list-style-type: none"> <li>a. Continue to advocate for access to AFC lending rates</li> <li>b. Continue to look for operational efficiencies</li> <li>c. Continue to work with senior's ministry on long-term real estate strategy to dispose of small rural facilities with chronic vacancies</li> </ul>	<ul style="list-style-type: none"> <li>• Sustainable mortgage rates</li> <li>• Control need for increases to funding</li> <li>• Reduced costs to the Province and re-profile into more appropriate housing</li> </ul>
2. Improve financial processes	<ul style="list-style-type: none"> <li>a. Explore mixed rent revenue model</li> <li>b. Improve record keeping on life cycle of capital items</li> <li>c. Implement 5-year budget plans and analyze value to centralized budgeting</li> <li>d. Develop a procurement plan that includes preferred vendors, standing purchase orders, bulk buying, common finishes</li> </ul>	<ul style="list-style-type: none"> <li>• A more diverse group of residents</li> <li>• Less reliance on provincial and municipal subsidies</li> <li>• Operations efficiencies through pro-active approach to capital spending</li> </ul>
<b>Employees:</b>		
1. Staffing	<ul style="list-style-type: none"> <li>a. Educate community on employment opportunities with Foundation</li> <li>b. Host a job fair at new senior's facility or participate in other recruitment opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Attract and retain quality employees for new facility</li> <li>• Offset recruiting costs – will allow funding for training and job shadowing</li> </ul>
2. Develop a recruitment/retention/succession plan	<ul style="list-style-type: none"> <li>a. Attend job fairs, participate in work experience programs</li> </ul>	<ul style="list-style-type: none"> <li>• Become a "preferred" recognized employer through local Chamber of Commerce</li> </ul>



	<ul style="list-style-type: none"><li>b. Explore RAP program through schools</li><li>c. Explore flexible hours and less traditional staffing models</li><li>d. Develop strategies to minimize staff burnout</li><li>e. Develop succession planning strategy</li><li>f. Expand volunteer roles</li><li>g. Consider employee referral program</li></ul>	<ul style="list-style-type: none"><li>• Employees are engaged and productive</li></ul>
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## FINANCIAL PLAN AND FORECASTS

See Appendix C

- Strong Balance Sheet
- Good cash flow position
- Proven ability to meet budget targets
- Continued funding and support from Province and Municipalities
- Substantial waitlist, low vacancy rates suggests consistent rental revenue
- Provincial move to bottom line accountability provides flexibility
- Provincial move towards allowing unspent funding to carry forward
- Our challenge would be that the Provincial process restricts responsible management of funding and capital budget approvals are often outdated or obsolete

# CAPITAL PLANNING STRATEGY

Capital Projects listed in order of request

1) Spirit River Seniors Facility – new build, replacement of the 50-year-old Spirit River “Pleasantview Lodge”. This old lodge currently has 42 SL2 beds that supports seniors in the community area for GSF. Alberta Health Services had identified Spirit River as a “high need” for assisted living level 4 and 4D (dementia) beds. In 2017/18 GSF completed a Needs Assessment for the area that confirmed the need for more seniors living accommodations, and in 2018 GSF completed a business plan for a new facility. In 2018 GSF submitted the needs assessment and the business plan to Alberta Seniors and Housing to request funding support. The new facility, at \$24 million, would hold 52 level 4 and 4D beds and provide enough SL2 beds to allow closure of the old lodge. A provincial announcement for funding for \$24, for this new project, was received in February 2019. GSF is awaiting funds to proceed with this project and therefore lists this project in our priority listing.

2) Amisk Court Expansion – increased seniors accommodation capacity  
Amisk Court requires demolition of older unit areas and rebuild of new units. 13 units demolished, and 33 new units added that will provide assisted living for seniors. Amisk currently does not have assisted living units, offering only Seniors Self Contained (SSC) units. The attached needs assessment indicates the need for seniors assisted living in this community. An \$11 million-dollar project that has full GSF support to start as soon as is possible. Documentation supporting this project (needs assessment and Amisk Court Addition/Renovation) and is attached in Attachment 7.

3) DeBolt – new replacement, reduced maintenance and site issues  
Request for new Buildings. Funding request for new buildings to replace the old Seniors Self Contained (SSC) units. These two SSC units have four, one-bedroom suites and have been closed due to safety/soil erosion issues at their current location. Replacement of these units with new modular units is proposed as the old units utilize old building structures that are challenged with code issues and should be demolished to allow land reclamation in this community. Replacement of the units with new is estimated at \$1 million. Examples of the proposed units are attached within Attachment 12.

4) Sexsmith – replacement of old with new to reduce maintenance and future costs  
Request for construction assistance (shortfall needed for construction of new buildings). The old single-family homes are +30 years old, providing high cost of maintenance and utility services. Estimated requested capital shortfall required is \$450,000. A business plan is provided in Attachment 13.

# APPENDICES

**APPENDIX A - HMB CORPORATE PROFILE**

**APPENDIX B - PROPERTY PROFILE**

**APPENDIX C - FINANCIAL BUDGET AND FORECASTS**

**APPENDIX D - CAPITAL MAINTENANCE AND RENEWAL**

**APPENDIX E - CAPITAL PRIORITIES**

**APPENDIX F - SURPLUS PROPERTIES**

Appendix A – Housing Management Body Corporate Profile				
Organization details				
Housing Management Body Name	Grande Spirit Foundation			
Incorporation type	<input checked="" type="checkbox"/> Alberta Housing Act			
	<input type="checkbox"/> Societies Act			
	<input type="checkbox"/> Part 9, Alberta Companies Act			
	<input type="checkbox"/> Other (please specify)			
Board of Directors	<b>Name</b>	<b>Position</b>	<b>Phone Number</b>	<b>Email Address</b>
	Judy Kokotilo-Bekkerus	Board Chair	780-882-1878	jkokotilo-bekkerus@beaverfodge.ca
	Alvin Hubert	Vice Chair	780-864-0890	ahubert@saddlehills.ab.ca
	Chris Thiessen	Member	780-381-1328	cthiessen@cityofgp.com
	Corey Beck	Member	780-831-6394	cbeck@countypg.ab.ca
	Isak Skjaveland	Member	780-814-9997	councillorskjaveland@seksmith.ca
	Roxie Rutt	Member	780-558-9640	roxie.rutt@mdgreenview.ab.ca
	Denise Joudrey	Member	780-837-0890	djoudrey@birchhillscounty.com
	Denise Skoworodko	Member	780-864-4055	skowo@hotmail.com
	Elaine Garrow	Member	780-512-9628	egarow@mdspiritrivier.ab.ca
	Joanne Chelick	Member	780-500-7170	joanne.chelick@hycroft.ca
	Cory Gundersen	Member	780-882-1353	councillorgundersen@wembley.ca
	Brian Peterson	Member	780-228-0036	brian2280034@gmail.com
Senior management team	<b>Name</b>	<b>Position</b>	<b>Phone Number</b>	<b>Email Address</b>
	Steve Madden	General Manager	780-532-2905	smadden@grandespirit.org
	Samantha Stuart	Finance Manager	780-532-2905	sstuart@grandespirit.org
	Wes Jacobs	Facilities Manager	780-532-3276	wjacobs@grandespirit.org
	Kathy Belyan	Housing Manager	780-532-2901	kbelyan@grandespirit.org
	Wendy Vandelaar	Housing Manager	780-532-8712	wvandelaar@grandespirit.org
	Shari Hrehoruk	Housing Manager	780-538-1818	shrehoruk@grandespirit.org
	Evelyn Bzowy	Housing Manager	780-864-3766	ebzowy@grandespirit.org
	Arlene Charlesworth	Housing Manager	587-771-9432	acharlesworth@grandespirit.org
	Terry Linklater	Housing Manager	780-354-2121	tlinklater@grandespirit.org
Julie Phelps	Housing Manager	780-532-3276	jphelps@grandespirit.org	
Governance structure (including any other organizations associated with the HMB)	Board of Directors - Councillors, Reeves and Mayors from 12 contributing municipalities Management Committee - Board Members -5 Largest municipal requisitioners -Town of Spirit River -3 elected at November Full Board Meeting			
List of contracts to provide services on behalf of other organizations / contracts to have services provided by another organization (e.g. with AHS or other HMBs).	Management Contract with Grande Prairie Residential Society (non-profit) -70 unit affordable housing complex - Margaret Edgson Manor -17 Unit wheelchair accessible RGI housing - deficit funded by the province Management contract with the City of Grande Prairie (C.B.O.) -40 unit affordable housing complex - Heartstone Manor AHS provides 24 hour Home Care and MAP support to our Lodge facilities in Grande Prairie, Clairmont and Spirit River			
Number of full time employees	83			
Number of part time employees	35 Part time 23 relief staff			
Number of employees earning minimum wage. <b>N.B. PLEASE DO NOT DISCLOSE IF THIS NUMBER IS 5 OR LOWER</b>				
Categories of staff (e.g. management, maintenance, administration, housekeeping, catering, resident services etc.).	Administration Maintenance Resident Services Food Services			
2018 Annual Employee Turnover (average monthly employment / number of separations * 100)	38.60%			
Are staff unionized?	Yes CUPE Local 3623			
Organizational chart				
Insert a high level organizational chart for the HMB (can be attached separately if required)	See attached organizational chart.			

## Appendix B – Property Profile

This document should include all properties that the HMB manages, owns, operates or has any connection to through other companies. Tables are provided and these should be completed for each category.

SCHEDULE A PROPERTIES				
Project Name	Address	Number of Units	Ownership	Building Type
Amisk Court	1026 4 Avenue Beaverlodge	36	Province	Walk Up
Amisk Court	1026 4 Avenue Beaverlodge	24	Province	Walk Up
Beaverlodge Family Housing	1118 3 Avenue Beaverlodge	1	Province	Single Family
Beaverlodge Family Housing	122 11 Street Beaverlodge	1	Province	Single Family
Beaverlodge Family Housing	520 6 Avenue Beaverlodge	1	Province	Single Family
Beaverlodge Family Housing	717 Oakk Drive Beaverlodge	1	Province	Single Family
Bezanson Senior Cottages	10102 98 Avenue Bezanson	6	Province	Mobile Home
Sexsmith Family Housing	9822 103 Avenue Clairmont	1	Province	Mobile Home
Sexsmith Family Housing	9824 103 Avenue Clairmont	1	Province	Mobile Home
Laura DeBolt	1 Street East DeBolt	8	Province	Single Story Apt
Summerset Manor	4909 52 Avenue Eaglesham	8	Province	Single Story Apt
Aurora Court	10013 96 Street Grande Prairie	30	Province	Highrise
James Manor	10102 103 Avenue Grande Prairie	21	Province	Highrise
Dieppe Manor	9428 121 Avenue Grande Prairie	71	Province	Walk Up
Grande Prairie Family Housing	10216 105 Avenue Grande Prairie	8	Province	Walk Up
Grande Prairie Family Housing	10113A/10113B 92A Street GP	2	Province	Duplex
Grande Prairie Family Housing	7316/7318 93A Street GP	2	Province	Duplex
Grande Prairie Family Housing	9306A/9306B 105 Avenue GP	2	Province	Duplex
Grande Prairie Family Housing	9314A/9314B 106 Avenue GP	2	Province	Duplex
Grande Prairie Family Housing	9401/9405 120 Avenue GP	2	Province	Duplex
Grande Prairie Family Housing	9529/9533 121 Avenue GP	2	Province	Duplex
Grande Prairie Family Housing	9717 177 Avenue Grande Prairie	1	Province	Single Family
Sunshine Plaza	3 Avenue s - 1 Street E LaGlance	12	Province	Single Story Apt
Potter Villa	4630-4638 49 Street Rycroft	8	Province	Single Story Apt
Sunset Homes	9702 97 Avenue Sexsmith	18	Province	Senior Apartment
Sexsmith Family Housing	10121 99 Street Sexsmith	1	Province	Single Family
Sexsmith Family Housing	9302 100 Avenue Sexsmith	1	Province	Single Family
Sexsmith Family Housing	9601 91 Street Sexsmith	1	Province	Single Family
Sexsmith Family Housing	9709 98 Avenue Sexsmith	1	Province	Single Family
Sexsmith Family Housing	9716 97 Street Sexsmith	1	Province	Single Family
Sexsmith Family Housing	9805 91 Street Sexsmith	1	Province	Single Family
Roe Haven Manor	4301 52 Street Spirit River	12	Province	Single Story Apt
Dr. Law Manor	5228 44 Avenue Spirit River	8	Province	Single Story Apt
Spirit River Family Housing	43 McAlpine Crescent Spirit River	1	Province	Single Family
Spirit River Family Housing	48 McAlpine Crescent Spirit River	1	Province	Single Family
Poplar Ridge	Wanham	8	Province	Single Story Apt
Martin Hein	9535-9551 93 Avenue Wembley	8	Province	Single Story Apt
Beaverlodge Family Housing	9315 98 Street Wembley	1	Province	Single Family
Beaverlodge Family Housing	9519 94 Avenue Wembley	1	Province	Single Family









# Average Cost Per Unit - Comparables - Factual Information Only

Based on 2017 Audit Data - Latest Reviewed

		Social Housing						Lodge
		Community Housing			Seniors Self Contained			
		Small HMB	Medium HMB	Large HMB	Small HMB	Medium HMB	Large HMB	
<b>REVENUE</b>								
400000	Rent	4,029	4,336	4,514	5,676	5,845	5,382	14,476
410000	Resident Services	26	606	190	527	711	672	699
420000	Non-Resident Services	7	113	20	9	28	35	292
	Other Revenue <sup>1</sup>	900	1,023	1,437	226	176	349	4,490
430050	ASHC - LAP grant (Lodge)							3,617
460010	Municipal Requisition (Lodge)							5,514
	<b>Total Revenue</b>	<b>4,962</b>	<b>6,078</b>	<b>6,161</b>	<b>6,438</b>	<b>6,760</b>	<b>6,437</b>	<b>29,087</b>
<b>EXPENSES</b>								
500000	Taxes and Land Leases	35	12	147	-	3	9	14
510000	Utilities	1,893	2,818	2,443	1,710	1,649	1,556	1,979
520000	Operating	823	429	743	399	312	341	1,097
520000	Food (Lodge Only)							2,309
530000	Operating Maintenance	1,794	2,047	2,714	1,757	1,505	1,564	1,293
540000	Charitable Costs							12
550000	Human Resources	2,481	2,674	2,521	1,939	1,990	2,035	15,129
560000	Administration	1,347	1,041	552	682	569	448	1,441
580000	Health							1,249
	<b>Total Expenses</b>	<b>8,373</b>	<b>9,022</b>	<b>9,121</b>	<b>6,488</b>	<b>6,029</b>	<b>5,954</b>	<b>24,522</b>
	<b>Net Excess (Deficiency) of Revenue over Expenses from Operations</b>	<b>(3,411)</b>	<b>(2,944)</b>	<b>(2,960)</b>	<b>(50)</b>	<b>731</b>	<b>483</b>	<b>4,565</b>
<b>OTHER EXPENSES</b>								
590000	Interest costs							406
591000	Other			298		15	12	166
592000	Amortization							1,894
	<b>Net Excess (Deficiency)</b>	<b>(3,411)</b>	<b>(2,944)</b>	<b>(3,258)</b>	<b>(50)</b>	<b>716</b>	<b>471</b>	<b>2,100</b>

<b>LEGEND</b>	Size	# of HMBs	# of Units
Small HMB	0 to 100 Units	46	2,032
Medium HMB	101 to 500 Units	42	9,079
Large HMB	> 501 Units	7	13,780

**Note 1:** Other revenues includes: Grants for Restricted Purposes, Rent Supplement Grants, Management and Administration, Investment Income and Other Income. These revenues may not be applicable to your organization or be representative of the costs per unit.

# Consolidated Financial Operating Summary

Organization: **Grande Spirit Foundation**

*Amounts below will be transferred from input provided in the respective tabs (Social Housing, Lodge, Affordable Housing, Other Housing)*

REVENUE	2018 Actuals	2019 Budget	2019 Forecast	2020 Projected	2021 Projected	2022 Projected
400000 Rent	8,537,002	8,416,065	9,352,092	9,430,170	9,442,550	9,455,550
410000 Resident Services	358,028	634,790	607,068	670,010	670,010	670,010
420000 Non-Resident Services	360,090	22,900	22,900	30,300	30,300	30,300
Other Revenue	-	-	-	-	-	-
430050 ASHC - LAP grant (Lodge Only)	2,895,487	1,726,121	1,622,527	1,622,527	1,622,527	1,622,527
460010 Municipal Requisition (Lodge Only)	1,115,058	1,170,808	1,170,809	1,241,058	1,278,290	1,316,638
<b>Total Revenue</b>	<b>13,265,665</b>	<b>11,970,684</b>	<b>12,775,396</b>	<b>12,994,065</b>	<b>13,043,677</b>	<b>13,095,025</b>
<b>EXPENSES</b>						
500000 Taxes and Land Leases	-	2,500	2,500	2,500	2,500	2,500
510000 Utilities	1,219,389	1,888,400	1,807,614	1,797,000	1,828,332	1,860,604
520000 Operating	244,333	399,849	362,492	407,699	416,634	425,837
520000 Food (Lodge Only)	1,031,461	1,025,900	1,024,114	1,079,000	1,111,370	1,144,711
530000 Operating Maintenance	6,358,498	1,095,030	1,527,532	1,197,850	1,216,237	1,235,176
540000 Charitable Costs	-	-	-	-	-	-
550000 Human Resources	6,201,291	6,275,324	6,245,845	6,639,479	6,807,168	6,979,888
560000 Administration	809,754	945,275	945,273	997,609	1,014,653	1,032,208
Other Expense	-	-	-	-	-	-
<b>Total Expenses</b>	<b>15,864,725</b>	<b>11,632,278</b>	<b>11,915,370</b>	<b>12,121,137</b>	<b>12,396,894</b>	<b>12,680,925</b>
<b>Net Excess (Deficiency) from Operations</b>	<b>(2,599,060)</b>	<b>338,406</b>	<b>860,025</b>	<b>872,928</b>	<b>646,782</b>	<b>414,101</b>
<b>OTHER EXPENSES</b>						
590000 Interest costs	473,584	469,950	469,950	447,557	447,557	447,557
591000 Other	-	448,238	448,238	470,612	470,612	470,612
592000 Amortization	1,281,332	-	-	-	-	-
<b>Net Excess (Deficiency)</b>	<b>(4,353,976)</b>	<b>(579,782)</b>	<b>(58,163)</b>	<b>(45,241)</b>	<b>(271,387)</b>	<b>(504,068)</b>

## Financial Operating Summary - Social Housing

Organization: Grande Spirit Foundation

Please do not adjust the structure of this sheet (rows/columns)

		2018 Actuals			2019 Budget (Alberta Seniors and Housing)			2019 Forecasted (HMB)		
		Seniors Self Contained	Community Housing - ASHC Owned	Community Housing - Non-ASHC Owned	Seniors Self Contained	Community Housing - ASHC Owned	Community Housing - Non-ASHC Owned	Seniors Self Contained	Community Housing - ASHC Owned	Community Housing - Non-ASHC Owned
<b>REVENUE</b>										
400000	Rent	1,742,185	336,112		1,694,500	306,700		1,759,607	324,822	
410000	Resident Services	85,774			287,530	81,340		298,978	90,990	
420000	Non-Resident Services	210,030	97,743							
	Other Revenue									
	<b>Total Revenue</b>	<b>2,037,989</b>	<b>433,855</b>	<b>-</b>	<b>1,982,030</b>	<b>388,040</b>	<b>-</b>	<b>2,058,585</b>	<b>415,812</b>	<b>-</b>
<b>EXPENSES</b>										
500000	Taxes and Land Leases					2,500			2,500	
510000	Utilities	47,632	254,821		489,100	263,500		522,663	249,986	
520000	Operating	78,874	10,997		97,359	12,500		97,359	12,500	
530000	Operating Maintenance	4,386,270	157,135		417,250	167,700		530,168	171,419	
550000	Human Resources	788,332	244,616		793,045	256,793		790,359	230,000	
560000	Administration	217,212	139,386		260,397	164,590		260,397	164,588	
	Other Expense									
	<b>Total Expenses</b>	<b>5,518,318</b>	<b>806,956</b>	<b>-</b>	<b>2,057,151</b>	<b>867,583</b>	<b>-</b>	<b>2,200,946</b>	<b>830,993</b>	<b>-</b>
	<b>Net Excess (Deficiency) from Operations</b>	<b>(3,480,329)</b>	<b>(373,100)</b>	<b>-</b>	<b>(75,121)</b>	<b>(479,543)</b>	<b>-</b>	<b>(142,361)</b>	<b>(415,181)</b>	<b>-</b>



## Financial Operating Summary

Organization:

		Projected								
		2020			2021			2022		
		Seniors Self Contained	Community Housing - ASHC Owned	Community Housing - Non-ASHC Owned	Seniors Self Contained	Community Housing - ASHC Owned	Community Housing - Non-ASHC Owned	Seniors Self Contained	Community Housing - ASHC Owned	Community Housing - Non-ASHC Owned
<b>REVENUE</b>										
400000	Rent	1,720,550	279,000		1,720,550	279,000		1,720,550	279,000	
410000	Resident Services	298,190	76,820		298,190	76,820		298,190	76,820	
420000	Non-Resident Services									
	Other Revenue									
	<b>Total Revenue</b>	<b>2,018,740</b>	<b>355,820</b>	<b>-</b>	<b>2,018,740</b>	<b>355,820</b>	<b>-</b>	<b>2,018,740</b>	<b>355,820</b>	<b>-</b>
<b>EXPENSES</b>										
500000	Taxes and Land Leases		2,500			2,500			2,500	
510000	Utilities	489,500	263,100		489,500	263,100		489,500	263,100	
520000	Operating	97,409	12,450		97,409	12,450		97,409	12,450	
530000	Operating Maintenance	426,250	158,700		426,250	158,700		426,250	158,700	
550000	Human Resources	793,045	256,793		793,045	256,793		793,045	256,793	
560000	Administration	263,397	166,080		263,397	166,080		263,397	166,080	
	Other Expense									
	<b>Total Expenses</b>	<b>2,069,601</b>	<b>859,623</b>	<b>-</b>	<b>2,069,601</b>	<b>859,623</b>	<b>-</b>	<b>2,069,601</b>	<b>859,623</b>	<b>-</b>
	<b>Net Excess (Deficiency) from Operations</b>	<b>(50,861)</b>	<b>(503,803)</b>	<b>-</b>	<b>(50,861)</b>	<b>(503,803)</b>	<b>-</b>	<b>(50,861)</b>	<b>(503,803)</b>	<b>-</b>



**Appendix D: Capital Maintenance and Renewal**

First: Input your 12 digit project number (no spaces)  
 Second: Select the specific building from the drop down list (Column D)  
 Third: Input in the number of units pertaining to that specific building (Column J)  
 Fourth: Complete the remainder of the information (Columns K - P)

HMB: Grande Spirit Foundation

\$ 2,936,000 Total Requests  
 Note: include any energy savings or environmental considerations or opportunities associated with this project.

12 Digit Project Number	HMB Code	Building Name	Building Address	Municipality	Postal Code	Building Ownership	Program	# of Units	Priority Ranking	Major Expense Type	"Detailed" Description Of Work	Estimated Cost To Complete The Work	Environment Sustainability (Climate Change)	HMB Priority Ranking
1239-2751-2092	GSP	Pioneer Lodge	9504 - 100 Avenue	Grande Prairie	T8V4M9	Housing Management Body	Seniors Lodge	48	Life, Health and Safety Needs (Priority 1)	Building-Exterior and Interior	Window Replacement	\$ 120,000	Energy Savings	Priority 1 - High
1239-2751-0150	GSP	Heritage Lodge	10111 - 96 Street	Grande Prairie	T8V1Z8	Housing Management Body	Seniors Lodge	72	Life, Health and Safety Needs (Priority 1)	Building-Exterior and Interior	Replace Handrails	\$ 45,000		Priority 2 - Medium
1239-2751-0150	GSP	Heritage Lodge	10111 - 96 Street	Grande Prairie	T8V1Z8	Housing Management Body	Seniors Lodge	72	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Replace Jacuzzi Tub	\$ 40,000		Priority 1 - High
1239-2751-0150	GSP	Heritage Lodge	10111 - 96 Street	Grande Prairie	T8V1Z8	Housing Management Body	Seniors Lodge	72	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Zone Controls Upgrade	\$ 225,000		Priority 1 - High
1239-2751-0150	GSP	Wild Rose Manor	10111 - 96 Street	Grande Prairie	T8V1Z8	Housing Management Body	Seniors Lodge	72	Immediate Needs (Priority 2)	Building Envelope	Steam Table Replacement	\$ 8,000		Priority 2 - Medium
1239-2751-2056	GSP	Wild Rose Manor	9358 - 70 Avenue	Grande Prairie	T8V6L1	Housing Management Body	Seniors Lodge	115	Life, Health and Safety Needs (Priority 1)	Building-Exterior and Interior	Entrance Doors - Push Button Opener	\$ 25,000		Priority 2 - Medium
1239-2751-2056	GSP	Wild Rose Manor	9358 - 70 Avenue	Grande Prairie	T8V6L1	Housing Management Body	Seniors Lodge	115	Life, Health and Safety Needs (Priority 1)	Building-Exterior and Interior	Dining Room Flooring Upgrade - Cracked tiles	\$ 120,000		Priority 1 - High
1239-2751-2056	GSP	Wild Rose Manor	9358 - 70 Avenue	Grande Prairie	T8V6L1	Housing Management Body	Seniors Lodge	115	Life, Health and Safety Needs (Priority 1)	Ground Maintenance and Materials	Sidewalk Repair (East Side)	\$ 6,000		Priority 1 - High
1278-2751-0186	GSP	Pleasant View Lodge	5230 - 44 Avenue	Spirit River	T0H3G0	Housing Management Body	Seniors Lodge	42	Immediate Needs (Priority 2)	Building-Exterior and Interior	Common Area Paint	\$ 15,000		Priority 2 - Medium
1278-2751-0186	GSP	Pleasant View Lodge	5230 - 44 Avenue	Spirit River	T0H3G0	Housing Management Body	Seniors Lodge	42	Life, Health and Safety Needs (Priority 1)	Ground Maintenance and Materials	Sidewalk & Entrance Repairs	\$ 35,000		Priority 1 - High
1239-2755-0004	GSP	Aurora Court	10013 - 96 Street	Grande Prairie	T8V1Z8	Alberta Social Housing Corporation	Seniors Self Contained Apartments	30	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 10,000		Priority 1 - High
1239-2755-0004	GSP	Aurora Court	10013 - 96 Street	Grande Prairie	T8V1Z8	Alberta Social Housing Corporation	Seniors Self Contained Apartments	30	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 10,000		Priority 2 - Medium
1239-2755-0004	GSP	Aurora Court	10013 - 96 Street	Grande Prairie	T8V1Z8	Alberta Social Housing Corporation	Seniors Self Contained Apartments	30	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Roof Top Exhaust Add-on	\$ 100,000		Priority 2 - High
1239-2755-0004	GSP	Aurora Court	10013 - 96 Street	Grande Prairie	T8V1Z8	Alberta Social Housing Corporation	Seniors Self Contained Apartments	30	Immediate Needs (Priority 2)	Heating, Ventilation and Plumbing	Boiler Upgrade	\$ 100,000		Priority 2 - Medium
1239-2755-0004	GSP	Aurora Court	10013 - 96 Street	Grande Prairie	T8V1Z8	Alberta Social Housing Corporation	Seniors Self Contained Apartments	30	Life, Health and Safety Needs (Priority 1)	Electrical Systems	Security System	\$ 5,000		Priority 1 - High
1239-2755-2035	GSP	James Manor	10102 - 103 Avenue	Grande Prairie	T8V1C1	Alberta Social Housing Corporation	Seniors Self Contained Apartments	21	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 1 - High
1239-2755-2035	GSP	James Manor	10102 - 103 Avenue	Grande Prairie	T8V1C1	Alberta Social Housing Corporation	Seniors Self Contained Apartments	21	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 2 - Medium
1239-2755-2035	GSP	James Manor	10102 - 103 Avenue	Grande Prairie	T8V1C1	Alberta Social Housing Corporation	Seniors Self Contained Apartments	21	Life, Health and Safety Needs (Priority 1)	Ground Maintenance and Materials	Sidewalk Repair/Replacement	\$ 8,000		Priority 1 - High
1239-2755-2080	GSP	Dieppe Manor	9428 - 121 Avenue	Grande Prairie	T8V6H9	Alberta Social Housing Corporation	Seniors Self Contained Apartments	71	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 10,000		Priority 1 - High
1239-2755-2080	GSP	Dieppe Manor	9428 - 121 Avenue	Grande Prairie	T8V6H9	Alberta Social Housing Corporation	Seniors Self Contained Apartments	71	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 10,000		Priority 2 - Medium
1239-2755-2080	GSP	Dieppe Manor	9428 - 121 Avenue	Grande Prairie	T8V6H9	Alberta Social Housing Corporation	Seniors Self Contained Apartments	71	Immediate Needs (Priority 2)	Heating, Ventilation and Plumbing	Hot Water Tank	\$ 10,000		Priority 2 - Medium
1239-2755-2080	GSP	Dieppe Manor	9428 - 121 Avenue	Grande Prairie	T8V6H9	Alberta Social Housing Corporation	Seniors Self Contained Apartments	71	Life, Health and Safety Needs (Priority 1)	Ground Maintenance and Materials	Engineering Review for Parking Lot Expansion	\$ 40,000		Priority 1 - High
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Life, Health and Safety Needs (Priority 1)	Building-Exterior and Interior	Window Replacement (Sitting Area)	\$ 30,000		Priority 2 - Medium
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Immediate Needs (Priority 2)	Building-Exterior and Interior	Interior Painting	\$ 15,000		Priority 2 - Medium
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Immediate Needs (Priority 2)	Building-Exterior and Interior	Cabinet Replacement in Kitchen	\$ 10,000		Priority 2 - Medium
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	General Needs (Priority 3)	Building-Exterior and Interior	Siding - South & East Wings & Maintenance Shop	\$ 30,000		Priority 3 - Low
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Life, Health and Safety Needs (Priority 1)	Building-Exterior and Interior	Exterior Door Replacement	\$ 25,000		Priority 1 - High
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 1 - High
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 2 - Medium
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Life, Health and Safety Needs (Priority 1)	Building Envelope	Rekey Amisk Wings 1 - 4 & Install FOB reader	\$ 10,000		Priority 1 - High
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Immediate Needs (Priority 2)	Heating, Ventilation and Plumbing	Domestic Hot Water Tank	\$ 16,000		Priority 2 - Medium
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	AC Unit in Kitchen	\$ 50,000		Priority 1 - High
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9529 - 121 Avenue	Grande Prairie	T8V4R6	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building-Exterior and Interior	New siding (Duplex with 9533 - 121 Ave)	\$ 18,000		Priority 2 - Medium
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9533 - 121 Avenue	Grande Prairie	T8V4R6	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building-Exterior and Interior	New siding (Duplex with 9529 - 121 Ave)	\$ 18,000		Priority 2 - Medium
1202-2755-0001	GSP	Amisk Court	1026 - 4 Avenue	Beaverlodge	T0H0C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	60	Life, Health and Safety Needs (Priority 1)	Ground Maintenance and Materials	Parking Lot & Sidewalk Paving	\$ 200,000		Priority 1 - High
1289-2755-2257	GSP	Martin Hein Court	9535 - 93 Avenue	Wembley	T0H3S0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Replace two furnaces and hot water tanks	\$ 8,000		Priority 1 - High
1276-2755-2053	GSP	Sunset Homes	9702 - 97 Avenue	Sexsmith	T0H3C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	18	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 1 - High
1276-2755-2053	GSP	Sunset Homes	9702 - 97 Avenue	Sexsmith	T0H3C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	18	General Needs (Priority 3)	Building-Exterior and Interior	Siding	\$ 40,000		Priority 3 - Low
1276-2755-2053	GSP	Sunset Homes	9702 - 97 Avenue	Sexsmith	T0H3C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	18	Immediate Needs (Priority 2)	Heating, Ventilation and Plumbing	Replace five hot water tanks	\$ 5,000		Priority 2 - Medium
1276-2755-2053	GSP	Sunset Homes	9702 - 97 Avenue	Sexsmith	T0H3C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	18	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Replace MUA Units	\$ 30,000		Priority 1 - High
1276-2755-2053	GSP	Sunset Homes	9702 - 97 Avenue	Sexsmith	T0H3C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	18	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Replae two furnaces	\$ 30,000		Priority 1 - High
1276-2755-2053	GSP	Sunset Homes	9702 - 97 Avenue	Sexsmith	T0H3C0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	18	Life, Health and Safety Needs (Priority 1)	Ground Maintenance and Materials	Sidewalk & Parking Lot Paving	\$ 100,000		Priority 1 - High
1258-2755-2203	GSP	Sunshine Plaza	9902 - 97 Avenue	La Grace	T0H2J0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	12	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 2 - Medium
1258-2755-2203	GSP	Sunshine Plaza	9902 - 97 Avenue	La Grace	T0H2J0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	12	General Needs (Priority 3)	Ground Maintenance and Materials	Parking lot resurface & sidewalk completion	\$ 35,000		Priority 3 - Low
1258-2755-2203	GSP	Sunshine Plaza	9902 - 97 Avenue	La Grace	T0H2J0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	12	Immediate Needs (Priority 2)	Ground Maintenance and Materials	Hand Railings	\$ 14,000		Priority 2 - Medium
1278-2755-2051	GSP	Rose Haven/Dr. Law Manor	5228 - 44 Avenue	Spirit River	T0H3G0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	20	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 19,000		Priority 1 - High
1278-2755-2051	GSP	Rose Haven/Dr. Law Manor	5228 - 44 Avenue	Spirit River	T0H3G0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	20	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 19,000		Priority 2 - Medium
1278-2755-2051	GSP	Rose Haven/Dr. Law Manor	5228 - 44 Avenue	Spirit River	T0H3G0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	20	Life, Health and Safety Needs (Priority 1)	Ground Maintenance and Materials	Cement pads	\$ 5,000		Priority 1 - High
1278-2755-2051	GSP	Rose Haven/Dr. Law Manor	5228 - 44 Avenue	Spirit River	T0H3G0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	20	Immediate Needs (Priority 2)	Building Envelope	New appliances	\$ 6,500		Priority 2 - Medium
1274-2755-2233	GSP	Potter Villa	4634 - 49 Street	Rycroft	T0H3A0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 19,000		Priority 2 - Medium
1274-2755-2233	GSP	Potter Villa	4634 - 49 Street	Rycroft	T0H3A0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Immediate Needs (Priority 2)	Building Envelope	New appliances	\$ 6,600		Priority 2 - Medium
1284-2755-2052	GSP	Poplar Ridge Apartments	Wanham	Wanham	T0H3P0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 19,500		Priority 1 - High
1284-2755-2052	GSP	Poplar Ridge Apartments	Wanham	Wanham	T0H3P0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Replace hot water tanks and appliances	\$ 5,900		Priority 1 - High
1219-2755-2056	GSP	Summerset Manor	4909 - 52 Avenue	Eaglesham	T0H1H0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 20,000		Priority 3 - Low
1219-2755-2056	GSP	Summerset Manor	4909 - 52 Avenue	Eaglesham	T0H1H0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	General Needs (Priority 3)	Ground Maintenance and Materials	Sidewalk Repairs	\$ 30,000		Priority 3 - Low
1219-2755-2056	GSP	Summerset Manor	4909 - 52 Avenue	Eaglesham	T0H1H0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Immediate Needs (Priority 2)	Building Envelope	New appliances	\$ 5,500		Priority 1 - High
1209-2755-2202	GSP	Debolt Manors	1 Street East	Debolt	T0H1B0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	General Needs (Priority 3)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 3 - Low
1209-2755-2202	GSP	Debolt Manors	1 Street East	Debolt	T0H1B0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	8	Immediate Needs (Priority 2)	Heating, Ventilation and Plumbing	Furnace & hot water tank replacement	\$ 15,000		Priority 2 - Medium
1223-2755-2332	GSP	Bezanson Cottages	Unit 1	Bezanson	T0H0G0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	6	General Needs (Priority 3)	Suite Renewal	Suite Renewal	\$ 15,000		Priority 3 - Low
1223-2755-2332	GSP	Bezanson Cottages	Unit 1	Bezanson	T0H0G0	Alberta Social Housing Corporation	Seniors Self Contained Apartments	6	Immediate Needs (Priority 2)	Heating, Ventilation and Plumbing	Furnace & hot water tank replacement	\$ 15,000		Priority 2 - Medium
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9401 - 120 Avenue	Grande Prairie	T8V4P9	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building Envelope	Roof replacement (Duplex with 9405)	\$ 7,000		Priority 2 - Medium
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9405 - 120 Avenue	Grande Prairie	T8V4P9	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building Envelope	Roof replacement (Duplex with 9401)	\$ 7,000		Priority 2 - Medium
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9306A - 105 Avenue	Grande Prairie	T8V1G4	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building Envelope	Roof replacement (Duplex with 9306B)	\$ 7,000		Priority 2 - Medium
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	7316 - 93A Street	Grande Prairie	T8V6H5	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building Envelope	Roof replacement (Duplex with 9306A)	\$ 7,000		Priority 2 - Medium
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	7318 - 93A Street	Grande Prairie	T8V6H5	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building Envelope	Roof replacement (Duplex with 7318)	\$ 7,000		Priority 1 - High
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9314A - 106 Avenue	Grande Prairie	T8V1H7	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building-Exterior and Interior	New windows (Duplex with 9314B)	\$ 12,000		Priority 1 - High
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9529 - 121 Avenue	Grande Prairie	T8V4R6	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Building-Exterior and Interior	New windows (Duplex with 9314A)	\$ 12,000		Priority 1 - High
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	9533 - 121 Avenue	Grande Prairie	T8V4R6	Alberta Social Housing Corporation	Community Housing Provincially Owned	1	Immediate Needs (Priority 2)	Suite Renewal	Suite Renewal	\$ 35,000		Priority 1 - High
1239-2731-2213	GSP	Grande Prairie Provincial Family Housing	10216 - 105 Avenue	Grande Prairie	T8V1H5	Alberta Social Housing Corporation	Community Housing Provincially Owned	8	Life, Health and Safety Needs (Priority 1)	Heating, Ventilation and Plumbing	Sprinkler System	\$ 200,000		Priority 1 - High



**ALBERTA SENIORS AND HOUSING**

**CAPITAL PRIORITIES**

Before completing this form, please review the Seniors and Housing Capital Planning Framework on Alberta.ca

**Section 1: Applicant Information**

Organization Name (Only one organization can be listed):	Grande Spirit Foundation
Organization Type (select from drop-down menu):	Housing Management Body
If other selected, please specify:	
Project Partners (if applicable):	Town of Spirit River, MD of Spirit River, Saddle Hills County, Birch Hills County, Village of Rycroft
Describe Nature of Partnership (e.g. financial or	
Project Name:	Spirit River Seniors Housing Facility (G5)
Seniors and Housing Capital Program (select from drop-down menu):	Seniors Housing Development and Renewal Program

**Section 2: Proposal Overview**

<b>Proposal Scope</b>							
Provide a general description of the proposal including total number of units and type of affordability, number of buildings, and units per building (identify commercial uses if applicable):							
This building was constructed in 1960 and requires replacement. In 2017 there was a needs and demand analysis completed for the Central Peace Region, including Saddle Hills County, Birch Hills County, MD of Spirit River, Town of Spirit River and the Village of Rycroft. This demonstrated a need for seniors supportive living within the area, which promotes seniors aging in their community. In 2018, Alberta Health Services identified Spirit River as a top priority for future assisted living accommodations.							
This would be one new building that would include 40 lodge units and 52 supportive living units (26 level 4 and 26 level 4 for dementia). Units would be offered via our RGI system using seniors incomes and the AHS system for the assisted living units.							
Construction Type (select all that apply)							
Demolition	New Construction		Replacement		Addition		Conversion / Change of Use
Number of existing units:	42	Number of units to be decommissioned (if applicable):	0	Number of units to be demolished:	0	Number of units to be regenerated:	
Number of new constructed units:	92	Total proponent funded units:	0	Total number of units:	92	Net unit increase:	0
If this project includes the replacement, addition or conversion or an existing facility, please indicate:							
Year constructed:	1960	Existing Facility Condition Index (if known):			Describe the necessity for the proposed change:		
<p>A The age of the building and the need for more higher level units for the Central Peace region is on the rise. Alberta Health Services has confirmed (via RFP publication) that Spirit River is a top priority for an assisted living accommodation, for AHS clients. GSF's needs assessment also confirmed the need for more seniors accommodation and the Spirit River business plan confirmed the age and need to replace the existing Pleasantview Lodge with a new facility.</p>							
Type of Building(s) (select all that apply)							
Row and Stacked-Row Housing				Low-Rise Apartment (less than 4 storeys)			
Mid-Rise Apartment (4-11 storeys)				High-Rise Apartment (12 or more storeys)			
Mixed-Use							
Other (specify)		Lodge and assisted living - proposed, within the business plan, provides a selection of conceptual plans					
Please indicate the number of barrier-free units (10% minimum):					100%		
In the case 10% of the units are not barrier-free, please explain rationale below:							

Full facility will be provided barrier free access.

**Housing Need**

Was a needs assessment completed?	Yes	Year Completed:	2017	Consultant:	Gordon and Associates
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If yes, provide a short summary of the need for this project below:

Attachment # 8 - Central Peace Region Seniors Housing Needs Assessment was submitted in previous business plan, attached again

Describe the target population of residents for this project below:

Seniors lodge and assisted living. Current building has senior lodge units up to level 2 care. New building will have have lodge units and units with level 3, 4 and 4D to provide accomodation for assisted living needs. This may be extended beyond seniors, should it be required to accomodate funding.

If known, indicate the number of households on the waitlist for this target population within the same municipality:	120
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If known, indicate your organization's occupancy rate of the same housing type as the proposed project if one exists within the same municipality:	100%
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**Proposed Schedule**

c	Please indicate when the proposed initiative is needed to be completed by to fill the identified need:	The need exists today for assisted living (4 and 4D), is immediate, and not expected to reduce with our aging population, therefore as soon as is possible. We recognize the construction will take time for a facility of this size, therefore, a 2021 opening would be appreciated.
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**Proposed Capital Budget Estimate (Auto-filled based on input provided in section 3 & 4)**

D	Estimated Total Below Market Housing Capital Cost:	\$	26,100,000	Estimated Below Market Per Unit Capital Cost:	\$	283,696
	Estimated Total Market Housing Capital Cost (if applicable):	\$	-	Estimated Market Per Unit Capital Cost (if applicable):	#DIV/0!	
	Estimated Total Capital Cost:	\$	26,100,000	Estimated Per Unit Capital Cost (if applicable):	\$	283,696

**Proposed Ownership**

	Owner	Full or Partial Ownership	Provincial Lease Requested
Land	Province of Alberta	Full	No
Building	Province of Alberta	Full	No

**Proposed Location, if known:**

Civic Address:	5230 44 Avenue				
Municipality:	Town of Spirit River	Province:	Alberta	Postal Code:	T0H 3G0
Legal Address:					
Please indicate existing zoning of the site:	R4 High Density Residential		Is rezoning required?		

**Supporting Documentation**

F	Has a business case (incl. options analysis) been completed?	Yes	Year Completed:	2018	Consultant:	Gordon and Associates
	Has an concept study been completed?	Yes	Year Completed:	2018	Consultant:	Gordon and Associates

Has an environmental assessment been completed?	Yes	Year Completed:	Consultant:
Has a geo-technical assessment (if applicable) been completed?	no	Year Completed:	Consultant:

### Section 3: Capital Cost - ESTIMATE ONLY

Item	Below Market Units	Market Units / Commercial	Total
Land	\$ 800,000	\$ -	\$ 800,000
Planning Studies	\$ 1,359,300	\$ -	\$ 1,359,300
Design Services	\$ 691,500	\$ -	\$ 691,500
Construction Services	\$ 20,648,400	\$ -	\$ 20,648,400
Project Support Services	\$ 900,800	\$ -	\$ 900,800
Furniture and Equipment	\$ 1,700,000	\$ -	\$ 1,700,000
<b>TOTAL ESTIMATED CAPITAL COST</b>	<b>\$ 26,100,000</b>	<b>\$ -</b>	<b>\$ 26,100,000</b>

### Section 4: Funding Sources - ESTIMATE ONLY

List all expected funding sources below:

Names of Funding Sources	Below Market Units	Market / Commercial	Total
Housing Provider Equity Contribution	\$ 50,000	\$ -	\$ 50,000
Housing Provider Land Contribution		\$ -	\$ -
Private Loan	\$ -	\$ -	\$ -
Expected Federal Loan	\$ -	\$ -	\$ -
Expected Federal Funding Contribution	\$ -	\$ -	\$ -
Requested Provincial Funding Contribution	\$ 24,000,000	\$ -	\$ 24,000,000
Provincial Land Lease (if applicable)	\$ -	\$ -	\$ -
Expected Municipal Funding Contribution	\$ 1,250,000	\$ -	\$ 1,250,000
Expected Municipal Land Contribution	\$ 800,000	\$ -	\$ 800,000
Private Donation(s)		\$ -	\$ -
Other (specify)	\$ -	\$ -	\$ -
<b>*Total Funding Sources</b>	<b>\$ 26,100,000</b>	<b>\$ -</b>	<b>\$ 26,100,000</b>

\*Must equal "Total Estimated Capital Cost" of Project in Section 3.

### Section 5: Preliminary Project Budget - ESTIMATE ONLY

Unit Type (Select from drop-down menu)	Lodge - Supportive Living 2	Supportive Living 4	Supportive Living 4D	Supportive Living 4D		Total
Number of Below Market Units	40	26	26			92
Monthly Rental Revenue per Unit	\$ 1,595	\$ 2,081	\$ 2,081		\$ -	\$ 5,757
Total Annual Rental Revenue per Unit Type	\$ 765,600	\$ 649,272	\$ 649,272	\$ -	\$ -	#####
Average Sq.ft. per Unit Type	650	650	650	0	0	
Number of Market Units		0	0	0	0	-
Monthly Rent per Unit		\$ -	\$ -	\$ -	\$ -	\$ -
Total Annual Rental Revenue per Unit Type	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Average Sq.ft. per Unit Type		0	0	0	0	
<b>Total Units</b>						<b>92</b>

Which of the following are included in the monthly rent?	
Electricity	Cable / Phone / Internet
Heat	Other (specify)
Water & Sewer	
Using the format below, please provide a Project Budget based on a 5-year projection, and the number of units requested.	

Forecasted Annual Revenues	Year 1		Year 2		Year 3		Year 4		Year 5	
	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market
<b>Rental Structure (select from drop-down menu):</b>										
Rents	\$ 2,064,144	\$ -	\$2,126,068	\$ -	#####	\$ -	\$ 2,255,546	\$ -	\$2,323,212	\$ -
Lodge Requisition (if applicable)	\$ 175,000		\$ 185,000		\$ 198,000		\$ 213,000		\$ 221,000	
SL3, SL4, SL4D Funding (if applicable)	\$ 103,000		\$ 103,000		\$ 103,000		\$ 103,000		\$ 103,000	
Lodge Assistance Program (if applicable)	\$ 213,000		\$ 213,000		\$ 213,000		\$ 213,000		\$ 213,000	
Non-residential Rents (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ancillary Revenue (Specify)	\$ 50,000	\$ -	\$ 50,000	\$ -	\$ 50,000	\$ -	\$ 50,000	\$ -	\$ 50,000	\$ -
Subtotal	\$ 2,605,144	\$ -	\$2,677,068	\$ -	#####	\$ -	\$ 2,834,546	\$ -	\$2,910,212	\$ -
Annual Revenue Subtotal	\$ 2,605,144		\$ 2,677,068		\$ 2,753,850		\$ 2,834,546		\$ 2,910,212	
<b>Deduct</b>										
<b>Anticipated Annual Vacancy Rate</b>	<b>5%</b>	<b>0%</b>	<b>2%</b>	<b>0%</b>	<b>2%</b>	<b>0%</b>	<b>2%</b>	<b>0%</b>	<b>2%</b>	<b>0%</b>
Vacancy	\$ 103,207	\$ -	\$ 42,521	\$ -	\$ 43,797	\$ -	\$ 45,111	\$ -	\$ 46,464	\$ -
Subtotal	\$ 103,207	\$ -	\$ 42,521	\$ -	\$ 43,797	\$ -	\$ 45,111	\$ -	\$ 46,464	\$ -
Annual Revenue Deductions	\$ 103,207		\$ 42,521		\$ 43,797		\$ 45,111		\$ 46,464	
<b>Total Forecasted Revenues</b>	<b>2,501,937</b>		<b>2,634,547</b>		<b>2,710,053</b>		<b>2,789,435</b>		<b>2,863,748</b>	

Forecasted Annual Expenses	Year 1	Year 2	Year 3	Year 4	Year 5
Administration (Human Resources)	\$ 1,665,844	\$ 1,699,161	\$ 1,733,144	\$ 1,767,807	\$ 1,803,163
Property Management Services (if hired externally)	\$ -	\$ -	\$ -	\$ -	\$ -
People Centered Support Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Health Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ 95,404	\$ 97,312	\$ 99,258	\$ 101,243	\$ 103,268
Debt Servicing	\$ -	\$ -	\$ -	\$ -	\$ -
Anticipated Bad Debts (e.g. rental arrears)	\$ -	\$ -	\$ -	\$ -	\$ -
Insurance	\$ -	\$ -	\$ -	\$ -	\$ -
Property Taxes	\$ -	\$ -	\$ -	\$ -	\$ -
Replacement Reserve					
Utilities	\$ 271,492	\$ 276,922	\$ 282,460.28	\$ 288,109	\$ 293,872

Meal Provision (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Other (specify) - Operating	\$ 422,648	\$ 431,101	\$ 439,723	\$ 448,517	\$ 457,488
<b>Total Forecasted Annual Expenses</b>	<b>2,455,388</b>	<b>2,504,496</b>	<b>2,554,586</b>	<b>2,605,677</b>	<b>2,657,791</b>
<b>Estimated Annual Surplus/ (Deficit)</b>	<b>46,549</b>	<b>130,051</b>	<b>155,468</b>	<b>183,758</b>	<b>205,957</b>

Pease confirm all that apply:  Operating model is self-supporting  No provincial operating funding required  No capital maintenance funding required  
 Does the proposal require operating funding?

In the case of a surplus, please confirm the planned use of the operating surplus funds or in the case of a deficit, please confirm how operating expenses will be funded?

Expected operating surplus will be reinvested back into the facility, assist with future capital maintenance and future building replacement. Any deficits in future, operating budget will be reviewed, adjustments made and requests for increased rents and requisitions to cover deficit. Municipal Taxes are exempt as per the municipal MMGA for seniors facilities.

If property taxes are not indicated, please attach supporting documentation as to the municipal property tax exemption.

### Section 6: Additional Information

*Climate Change (Note: Include any energy savings or environmental considerations or opportunities associated with this project.):*

This facility, constructed to current code requirements, is expected to reduce heating and power usage costs with new HVAC and power systems. The building will have updated Emergency (nurse) call systems that assist reducing human resources inputs to operations, hold updated fire protection systems, provide updated infrastructure such as new sidewalks, parking, building exterior and interior (all reducing current high capital costs and operations on the old building assist to reduce high energy useage) and provide long term reduced costs of operations.

### Disclaimer

Seniors and Housing is a public body subject to the Freedom of Information and Protection of Privacy (FOIP) Act. Records in Senior's and Housing's custody and control may be subject to a request for access to information under the Act. By submitting an application form to Alberta Seniors and Housing, the applicant acknowledges and agrees to the sharing of information collected from the applicant with the Canada Mortgage and Housing Corporation (CMHC) and other Government of Alberta departments. Applicants are strongly advised to consult their own legal advisors as to the appropriate way in which confidential or proprietary business information should be identified in their applications.

**Incomplete submissions or use of previous submission templates will not be considered.**

**ALBERTA SENIORS AND HOUSING**

**CAPITAL PRIORITIES**

Before completing this form, please review the Seniors and Housing Capital Planning Framework on Alberta.ca

**Section 1: Applicant Information**

Organization Name (Only one organization can be listed):	Grande Spirit Foundation
Organization Type (select from drop-down menu):	Housing Management Body
If other selected, please specify:	
Project Partners (if applicable):	
Describe Nature of Partnership (e.g. financial or	
Project Name:	Amisk Court Expansion
Seniors and Housing Capital Program (select from drop-down menu):	Seniors Housing Development and Renewal Program

**Section 2: Proposal Overview**

A	<b>Proposal Scope</b>									
	Provide a general description of the proposal including total number of units and type of affordability, number of buildings, and units per building (identify commercial uses if applicable):									
	Facility is owned by ASHC and managed by Grande Spirit Foundation Original building constructed in 1972 with at least 5 additions, sections nearing end of useful life.									
	Need and Demand analysis demonstrated need for seniors housing in this vibrant community-supportive housing for seniors would allow residents to age in their own community.									
	Regeneration of existing facility, maintaining 36 senior self-contained units and adding 36 lodge units.									
	Construction Type (select all that apply)									
	Demolition		New Construction		Replacement		Addition		Conversion / Change of Use	
	Number of existing units:	60	Number of units to be decommissioned (if applicable):			Number of units to be demolished:			Number of units to be regenerated:	24
	Number of new constructed units:	12	Total proponent funded units:			Total number of units:		72	Net unit increase:	12
	If this project includes the replacement, addition or conversion or an existing facility, please indicate:									
	Year constructed:	1972	Existing Facility Condition Index (if known):			Describe the necessity for the proposed change:				
	Type of Building(s) (select all that apply)									
	Row and Stacked-Row Housing				Low-Rise Apartment (less than 4 storeys)					
	Mid-Rise Apartment (4-11 storeys)				High-Rise Apartment (12 or more storeys)					
	Mixed-Use									
Other (specify)		Lodge								
Please indicate the number of barrier-free units (10% minimum):										
In the case 10% of the units are not barrier-free, please explain rationale below:										
<b>Housing Need</b>										

Was a needs assessment completed?		Yes (Attach Report)	No	Year Completed:	Consultant:
If yes, provide a short summary of the need for this project below:					
The completed Needs Assessment - Attachment #7 - Need and Demand Analysis indicates the need for increased seniors accomodation availability for the beaverlodge/wembley area. There is no lodge or assisted living facilities in these areas. This proposal requests the demolition of an old section of Amisk Court (that provides extremley poor mobile passage, not Fire Sprinkler system and holds asbestos) and replace with new units, and increase the number of units from 60 to 80. At the current level of 60, the economy of scale is low, creating ongoing operations deficits, combined with an older section that is very difficult to complete maintenance on (Asbestos abatement required), making this old section expensive to maintain. Updated facility with more units will assist removal of deficit issues.					
Describe the target population of residents for this project below:					
Current building is Seniors RGI at 30% of income, provincially owned building. New build and expansion will be lodge and assited living requiring no provincial funding for operations					
If known, indicate the number of households on the waitlist for this target population within the same municipality:					
If known, indicate your organization's occupancy rate of the same housing type as the proposed project if one exists within the same municipality:					
<b>Proposed Schedule</b>					
Please indicate when the proposed initiative is needed to be completed by to fill the identified need:		Oct-21			
<b>Proposed Capital Budget Estimate (Auto-filled based on input provided in section 3 &amp; 4)</b>					
Estimated Total Below Market Housing Capital Cost:		\$	11,034,000	Estimated Below Market Per Unit Capital Cost:	\$ 27,585
Estimated Total Market Housing Capital Cost (if applicable):		\$	-	Estimated Market Per Unit Capital Cost (if applicable):	#DIV/0!
Estimated Total Capital Cost:		\$	11,034,000	Estimated Per Unit Capital Cost (if applicable):	\$ 27,585
<b>Proposed Ownership</b>					
	Owner	Full or Partial Ownership		Provincial Lease Requested	
Land	ASCH	Full			
Building	ASCH	Full			
<b>Proposed Location, if known:</b>					
Civic Address:	1026 4 Avenue				
Municipality:	Beaverlodge	Province:	Alberta	Postal Code:	T0H 0C0
Legal Address:					
Please indicate existing zoning of the site:			Is rezoning required?		
<b>Supporting Documentation</b>					
Has a business case (incl. options analysis) been completed?	Yes (Attach Report)	No	Year Completed:	2017	Consultant: Bennett Architect
Has an concept study been completed?	Yes (Attach Report)	No	Year Completed:	2017	Consultant: Bennett Architect
Has an environmental assessment been completed?	Yes (Attach Report)	No	Year Completed:		Consultant:
Has a geo-technical assessment (if applicable) been completed?	Yes (Attach Report)	No	Year Completed:		Consultant:

Section 3: Capital Cost - ESTIMATE ONLY					
Item	Below Market Units		Market Units / Commercial		Total
Land	\$	350,000	\$	-	\$ 350,000
Planning Studies	\$	100,000	\$	-	\$ 100,000
Design Services	\$	325,000	\$	-	\$ 325,000
Construction Services	\$	9,559,000	\$	-	\$ 9,559,000

Project Support Services	\$	250,000	\$	-	\$	250,000
Furniture and Equipment	\$	450,000	\$	-	\$	450,000
<b>TOTAL ESTIMATED CAPITAL COST</b>	<b>\$</b>	<b>11,034,000</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>11,034,000</b>

**Section 4: Funding Sources - ESTIMATE ONLY**

List all expected funding sources below:

Names of Funding Sources	Below Market Units	Market / Commercial	Total
Housing Provider Equity Contribution	\$ 30,000	\$ -	\$ 30,000
Housing Provider Land Contribution	\$ -	\$ -	\$ -
Private Loan	\$ -	\$ -	\$ -
Expected Federal Loan	\$ -	\$ -	\$ -
Expected Federal Funding Contribution	\$ -	\$ -	\$ -
Requested Provincial Funding Contribution	\$ 10,579,000	\$ -	\$ 10,579,000
Provincial Land Lease (if applicable)	\$ -	\$ -	\$ -
Expected Municipal Funding Contribution	\$ 75,000	\$ -	\$ 75,000
Expected Municipal Land Contribution	\$ 350,000	\$ -	\$ 350,000
Private Donation(s)	\$ -	\$ -	\$ -
Other (specify)	\$ -	\$ -	\$ -
<b>*Total Funding Sources</b>	<b>\$ 11,034,000</b>	<b>\$ -</b>	<b>\$ 11,034,000</b>

\*Must equal "Total Estimated Capital Cost" of Project in Section 3.

**Section 5: Preliminary Project Budget - ESTIMATE ONLY**

Unit Type (Select from drop-down menu)							Total
Number of Below Market Units	80	80	80	80	80	80	400
Monthly Rental Revenue per Unit	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 6,500
Total Annual Rental Revenue per Unit Type	\$ 1,248,000	\$ 1,248,000	\$ 1,248,000	\$ 1,248,000	\$ 1,248,000	\$ 1,248,000	\$6,240,000
Average Sq.ft. per Unit Type	550	550	550	550	550	550	
Number of Market Units		0	0	0	0	0	-
Monthly Rent per Unit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Annual Rental Revenue per Unit Type	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Average Sq.ft. per Unit Type	0	0	0	0	0	0	
<b>Total Units</b>							<b>400</b>

Which of the following are included in the monthly rent?

Electricity	Cable / Phone / Internet
Heat	Other (specify)
Water & Sewer	

Using the format below, please provide a Project Budget based on a 5-year projection, and the number of units requested.

Forecasted Annual Revenues	Year 1		Year 2		Year 3		Year 4		Year 5	
	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market
Rental Structure (select from drop-down menu):	30% of Gross Income		30% of Gross Income		30% of Gross Income		30% of Gross Income		30% of Gross Income	
Rents	\$ 6,240,000	\$ -	\$ 1,248,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Lodge Requisition (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	
SL3, SL4, SL4D Funding (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	



Lodge Assistance Program (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	
Non-residential Rents (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ancillary Revenue (Specify)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal	\$ 6,240,000	\$ -	\$ 1,248,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Annual Revenue Subtotal	\$ 6,240,000		\$ 1,248,000		\$ -		\$ -		\$ -	
<b>Deduct</b>										
<b>Anticipated Annual Vacancy Rate</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Vacancy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Annual Revenue Deductions	\$ -		\$ -		\$ -		\$ -		\$ -	
<b>Total Forecasted Revenues</b>	<b>6,240,000</b>		<b>1,248,000</b>		<b>-</b>		<b>-</b>		<b>-</b>	

Forecasted Annual Expenses	Year 1	Year 2	Year 3	Year 4	Year 5
Administration (Human Resources)	\$ 358,000	\$ 360,000	\$ 364,000	\$ 368,000	\$ 372,000
Property Management Services (if hired externally)	\$ -	\$ -	\$ -	\$ -	\$ -
People Centered Support Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Health Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ 87,000	\$ 89,000	\$ 93,000	\$ 97,000	\$ 101,000
Debt Servicing	\$ -	\$ -	\$ -	\$ -	\$ -
Anticipated Bad Debts (e.g. rental arrears)	\$ -	\$ -	\$ -	\$ -	\$ -
Insurance	\$ -	\$ -	\$ -	\$ -	\$ -
Property Taxes	\$ -	\$ -	\$ -	\$ -	\$ -
Replacement Reserve	\$ -	\$ -	\$ -	\$ -	\$ -
Utilities	\$ 105,500	\$ 108,000	\$ 112,000	\$ 116,000	\$ 120,000
Meal Provision (if applicable)	\$ 64,000	\$ 68,000	\$ 72,000	\$ 76,000	\$ 80,000
Other (specify)	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Forecasted Annual Expenses</b>	<b>614,500</b>	<b>625,000</b>	<b>641,000</b>	<b>657,000</b>	<b>673,000</b>
<b>Estimated Annual Surplus/ (Deficit)</b>	<b>5,625,500</b>	<b>623,000</b>	<b>(641,000)</b>	<b>(657,000)</b>	<b>(673,000)</b>

Pease confirm all that apply:      Operating model is self-supporting      No provincial operating funding required      No capital maintenance funding required  
Does the proposal require operating funding?

In the case of a surplus, please confirm the planned use of the operating surplus funds or in the case of a deficit, please confirm how operating expenses will be funded?

Surplus funds will be reinvested back into the facility to ensure long term sustainable facility and project(s).

If property taxes are not indicated, please attach supporting documentation as to the municipal property tax exemption.

**Section 6: Additional Information**  
Climate Change (Note: Include any energy savings or environmental considerations or opportunities associated with this project.):

Updated facility with new code requirements (HVAC/Electrical etc) will provide reduced emissions and overall expenses. A facility with a full Fire Sprinkler system desperately needed.

**Disclaimer**

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**Incomplete submissions or use of previous submission templates will not be considered.**

**ALBERTA SENIORS AND HOUSING**

**CAPITAL PRIORITIES**

Before completing this form, please review the Seniors and Housing Capital Planning Framework on Alberta.ca

**Section 1: Applicant Information**

Organization Name (Only one organization can be listed):	Grande Spirit Foundation
Organization Type (select from drop-down menu):	Housing Management Body
If other selected, please specify:	
Project Partners (if applicable):	MD Greenview
Describe Nature of Partnership (e.g. financial or):	Financial
Project Name:	Debolt - Seniors Self Contained
Seniors and Housing Capital Program (select from drop-down menu):	Seniors Housing Development and Renewal Program

**Section 2: Proposal Overview**

<b>Proposal Scope</b>							
Provide a general description of the proposal including total number of units and type of affordability, number of buildings, and units per building (identify commercial uses if applicable):							
4 new residential modulars that have two-one bedroom units for a total of 8 units in two modulars. Modulars would be for seniors self contained in replacement of the old SSC units.							
Construction Type (select all that apply)							
Demolition	New Construction		Replacement		Addition		Conversion / Change of Use
Number of existing units:	8	Number of units to be decommissioned (if applicable):	8	Number of units to be demolished:	8	Number of units to be regenerated:	
Number of new constructed units:	8	Total proponent funded units:	8	Total number of units:	8	Net unit increase:	0
If this project includes the replacement, addition or conversion or an existing facility, please indicate:							
Year constructed:	1981	Existing Facility Condition Index (if known):			Describe the necessity for the proposed change:		
A	Old units containing asbestos, makes maintenance expensive/difficult. Old units dated requiring extensive renovations. Old units to be moved due to erosion issues. Extensive costs required and complicated efforts with the community provides sensible alternative in purchasing new instead of recovery of old.						
Type of Building(s) (select all that apply)							
Row and Stacked-Row Housing				Low-Rise Apartment (less than 4 storeys)			
Mid-Rise Apartment (4-11 storeys)				High-Rise Apartment (12 or more storeys)			
Mixed-Use							
Other (specify)		2 buildings with 4 units in each = 8 one bedroom units					
Please indicate the number of barrier-free units (10% minimum):							
In the case 10% of the units are not barrier-free, please explain rationale below:							
Yes, new units would be provided barrier free within and access via wheelchair ramp (where required).							
<b>Housing Need</b>							

	Was a needs assessment completed?	Yes (Attach Report)	No	Year Completed:	Consultant:
	If yes, provide a short summary of the need for this project below:				
B	Describe the target population of residents for this project below:				
	Seniors SSC - RGI at 30% of income				
	If known, indicate the number of households on the waitlist for this target population within the same municipality:				12
	If known, indicate your organization's occupancy rate of the same housing type as the proposed project if one exists within the same municipality:				
<b>Proposed Schedule</b>					
C	Please indicate when the proposed initiative is needed to be completed by to fill the identified need: project expected completion by end of 2020.				
<b>Proposed Capital Budget Estimate (Auto-filled based on input provided in section 3 &amp; 4)</b>					
D	Estimated Total Below Market Housing Capital Cost:	\$	1,405,000	Estimated Below Market Per Unit Capital Cost:	\$ 35,125
	Estimated Total Market Housing Capital Cost (if applicable):	\$	-	Estimated Market Per Unit Capital Cost (if applicable):	#DIV/0!
	Estimated Total Capital Cost:	\$	1,405,000	Estimated Per Unit Capital Cost (if applicable):	\$ 35,125
<b>Proposed Ownership</b>					
		Owner	Full or Partial Ownership	Provincial Lease Requested	
	Land	MD of Greenview	Full		
	Building	ASHC	Full		
E	<b>Proposed Location, if known:</b>				
	Civic Address:	Debolt - new lands			
	Municipality:	MD Greenview	Province:	Alberta	Postal Code:
	Legal Address:				
	Please indicate existing zoning of the site:	Residential		Is rezoning required?	
<b>Supporting Documentation</b>					
F	Has a business case (incl. options analysis) been completed?	Yes (Attach Report)	No	Year Completed:	Consultant:
	Has an concept study been completed?	Yes (Attach Report)	No	Year Completed:	Consultant:
	Has an environmental assessment been completed?	Yes (Attach Report)	No	Year Completed:	Consultant:
	Has a geo-technical assessment (if applicable) been completed?	Yes (Attach Report)	No	Year Completed:	Consultant:

Section 3: Capital Cost - ESTIMATE ONLY					
Item	Below Market Units	Market Units / Commercial	Total		
Land	\$ 350,000	\$ -	\$		350,000
Planning Studies	\$ 50,000	\$ -	\$		50,000
Design Services	\$ -	\$ -	\$		-
Construction Services	\$ 980,000	\$ -	\$		980,000

Project Support Services	\$	25,000	\$	-	\$	25,000
Furniture and Equipment	\$	-	\$	-	\$	-
<b>TOTAL ESTIMATED CAPITAL COST</b>	<b>\$</b>	<b>1,405,000</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>1,405,000</b>

**Section 4: Funding Sources - ESTIMATE ONLY**

List all expected funding sources below:

Names of Funding Sources	Below Market Units	Market / Commercial	Total
Housing Provider Equity Contribution	\$ 25,000	\$ -	\$ 25,000
Housing Provider Land Contribution	\$ -	\$ -	\$ -
Private Loan	\$ -	\$ -	\$ -
Expected Federal Loan	\$ -	\$ -	\$ -
Expected Federal Funding Contribution	\$ -	\$ -	\$ -
Requested Provincial Funding Contribution	\$ 980,000	\$ -	\$ 980,000
Provincial Land Lease (if applicable)	\$ -	\$ -	\$ -
Expected Municipal Funding Contribution	\$ 50,000	\$ -	\$ 50,000
Expected Municipal Land Contribution	\$ 350,000	\$ -	\$ 350,000
Private Donation(s)	\$ -	\$ -	\$ -
Other (specify)	\$ -	\$ -	\$ -
<b>*Total Funding Sources</b>	<b>\$ 1,405,000</b>	<b>\$ -</b>	<b>\$ 1,405,000</b>

\*Must equal "Total Estimated Capital Cost" of Project in Section 3.

**Section 5: Preliminary Project Budget - ESTIMATE ONLY**

Unit Type (Select from drop-down menu)						Total
Number of Below Market Units	8	8	8	8	8	40
Monthly Rental Revenue per Unit	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 1,750
Total Annual Rental Revenue per Unit Type	\$ 33,600	\$ 33,600	\$ 33,600	\$ 33,600	\$ 33,600	\$ 168,000
Average Sq.ft. per Unit Type	500	500	500	500	500	
Number of Market Units	0	0	0	0	0	-
Monthly Rent per Unit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Annual Rental Revenue per Unit Type	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Average Sq.ft. per Unit Type	0	0	0	0	0	
<b>Total Units</b>						<b>40</b>

Which of the following are included in the monthly rent?

Electricity	Cable / Phone / Internet
Heat	Other (specify)
Water & Sewer	

Using the format below, please provide a Project Budget based on a 5-year projection, and the number of units requested.

Forecasted Annual Revenues	Year 1		Year 2		Year 3		Year 4		Year 5	
	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market
Rental Structure (select from drop-down menu):	30% of Gross Income		30% of Gross Income		30% of Gross Income		30% of Gross Income		30% of Gross Income	
Rents	\$ 168,000	\$ -	\$ 168,000	\$ -	\$ 168,000	\$ -	\$ 168,000	\$ -	\$ 168,000	\$ -
Lodge Requisition (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	
SL3, SL4, SL4D Funding (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	

Lodge Assistance Program (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	
Non-residential Rents (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ancillary Revenue (Specify)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal	\$ 168,000	\$ -	\$ 168,000	\$ -	\$ 168,000	\$ -	\$ 168,000	\$ -	\$ 168,000	\$ -
Annual Revenue Subtotal	\$ 168,000		\$ 168,000		\$ 168,000		\$ 168,000		\$ 168,000	
<b>Deduct</b>										
<b>Anticipated Annual Vacancy Rate</b>	<b>50%</b>	<b>0%</b>	<b>25%</b>	<b>0%</b>	<b>13%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Vacancy	\$ 84,000	\$ -	\$ 42,000	\$ -	\$ 21,840	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal	\$ 84,000	\$ -	\$ 42,000	\$ -	\$ 21,840	\$ -	\$ -	\$ -	\$ -	\$ -
Annual Revenue Deductions	\$ 84,000		\$ 42,000		\$ 21,840		\$ -		\$ -	
<b>Total Forecasted Revenues</b>	<b>84,000</b>		<b>126,000</b>		<b>146,160</b>		<b>168,000</b>		<b>168,000</b>	

Forecasted Annual Expenses	Year 1	Year 2	Year 3	Year 4	Year 5
Administration (Human Resources)	\$ 22,000	\$ 23,000	\$ 24,000	\$ 25,000	\$ 26,000
Property Management Services (if hired externally)	\$ -	\$ -	\$ -	\$ -	\$ -
People Centered Support Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Health Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ 20,500	\$ 21,000	\$ 21,500	\$ 22,000	\$ 22,500
Debt Servicing	\$ -	\$ -	\$ -	\$ -	\$ -
Anticipated Bad Debts (e.g. rental arrears)	\$ -	\$ -	\$ -	\$ -	\$ -
Insurance	\$ -	\$ -	\$ -	\$ -	\$ -
Property Taxes	\$ -	\$ -	\$ -	\$ -	\$ -
Replacement Reserve	\$ -	\$ -	\$ -	\$ -	\$ -
Utilities	\$ 17,000	\$ 17,500	\$ 18,000	\$ 18,500	\$ 19,000
Meal Provision (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Other (specify)	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Forecasted Annual Expenses</b>	<b>59,500</b>	<b>61,500</b>	<b>63,500</b>	<b>65,500</b>	<b>67,500</b>
<b>Estimated Annual Surplus/ (Deficit)</b>	<b>24,500</b>	<b>64,500</b>	<b>82,660</b>	<b>102,500</b>	<b>100,500</b>

Pease confirm all that apply:      Operating model is self-supporting      No provincial operating funding required      No capital maintenance funding required  
Does the proposal require operating funding?

In the case of a surplus, please confirm the planned use of the operating surplus funds or in the case of a deficit, please confirm how operating expenses will be funded?

In the case of deficit, funds will be required from the province (same as current deficit is covered for debolt). In case of surplus, funds will be reinvested into property improvements/mainteance required to assist reducing future deficit funding requests. Or surplus funds returned to province.

If property taxes are not indicated, please attach supporting documentation as to the municipal property tax exemption.

**Section 6: Additional Information**  
Climate Change (Note: Include any energy savings or environmental considerations or opportunities associated with this project.):

New modulars will have increased R value and newer heating systems, assisting reduction in utility costs. Connected units will further reduce utility/heating requirements. The new land will remove erosion issues and allow immediate placement of residents in need of housing.

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**ALBERTA SENIORS AND HOUSING**

**CAPITAL PRIORITIES**

**Before completing this form, please review the Seniors and Housing Capital Planning Framework on Alberta.ca**

**Section 1: Applicant Information**

Organization Name (Only one organization can be listed):	Grande Spirit Foundation
Organization Type (select from drop-down menu):	Housing Management Body
If other selected, please specify:	
Project Partners (if applicable):	
Describe Nature of Partnership (e.g. financial or	
Project Name:	Sexsmith Family Housing
Seniors and Housing Capital Program (select from drop-down menu):	Family and Community Housing Development and Renewal Program

**Section 2: Proposal Overview**

<b>Proposal Scope</b>							
Provide a general description of the proposal including total number of units and type of affordability, number of buildings, and units per building (identify commercial uses if applicable):							
Sale of six social family housing units and rebuild two new three unit social housing buildings (total units 6 in 2 buildings). The new build will require capital to assist shortfall funds needed for the new build. The province has already provided NSD for the old 6 units, now we are moving forward with new build (as per our capital plan submission in 2019) for these units. The business plan submitted at the time indicated capital shortfall for the completed project. This request is for the shortfall required to complete the build.							
Construction Type (select all that apply)							
Demolition	New Construction		Replacement		Addition		Conversion / Change of Use
Number of existing units:	6	Number of units to be decommissioned (if applicable):		Number of units to be demolished:		Number of units to be regenerated:	6
Number of new constructed units:	6	Total proponent funded units:	6	Total number of units:	6	Net unit increase:	0
If this project includes the replacement, addition or conversion or an existing facility, please indicate:							
Year constructed:	1980	Existing Facility Condition Index (if known):		Describe the necessity for the proposed change:			
A	All six family housing units were built in the late 1970s and early 1980s. Replacement of these units with latest Code requirements will assist with heating values, reduced footprint (one site) and decreased maintenance and future capital replacement items with new build. Row housing proposed in business plan attached.						
Type of Building(s) (select all that apply)							
Row and Stacked-Row Housing				Low-Rise Apartment (less than 4 storeys)			
Mid-Rise Apartment (4-11 storeys)				High-Rise Apartment (12 or more storeys)			
Mixed-Use							
Other (specify)							
Please indicate the number of barrier-free units (10% minimum):							
In the case 10% of the units are not barrier-free, please explain rationale below:							
The old housing did not provide for barrier free - the new units will have some barrier free items within them.							
<b>Housing Need</b>							



Was a needs assessment completed?		Yes (Attach Report)	No	Year Completed:	Consultant:
If yes, provide a short summary of the need for this project below:					
Grande Spirit Foundation currently has a waitlist for family housing of approximately 350. These buildings are of high demand/need to assist with our growing communities needs.					
Describe the target population of residents for this project below:					
Families - RGI 30% of income - social housing					
If known, indicate the number of households on the waitlist for this target population within the same municipality:					25
If known, indicate your organization's occupancy rate of the same housing type as the proposed project if one exists within the same municipality:					100%
<b>Proposed Schedule</b>					
Please indicate when the proposed initiative is needed to be completed by to fill the identified need:		completion by end of 2020			
<b>Proposed Capital Budget Estimate (Auto-filled based on input provided in section 3 &amp; 4)</b>					
Estimated Total Below Market Housing Capital Cost:		\$	-	Estimated Below Market Per Unit Capital Cost:	\$ -
Estimated Total Market Housing Capital Cost (if applicable):		\$	-	Estimated Market Per Unit Capital Cost (if applicable):	#DIV/0!
Estimated Total Capital Cost:		\$	-	Estimated Per Unit Capital Cost (if applicable):	\$ -
<b>Proposed Ownership</b>					
	Owner	Full or Partial Ownership		Provincial Lease Requested	
Land	HMB	Full			
Building	HMB	Full			
<b>Proposed Location, if known:</b>					
Civic Address:					
Municipality:	Sexsmith	Province:	Alberta	Postal Code:	
Legal Address:					
Please indicate existing zoning of the site:		Residential		Is rezoning required?	
<b>Supporting Documentation</b>					
Has a business case (incl. options analysis) been completed?		Yes (Attach Report)	No	Year Completed:	2018 Consultant: GSF
Has an concept study been completed?		Yes (Attach Report)	No	Year Completed:	Consultant:
Has an environmental assessment been completed?		Yes (Attach Report)	No	Year Completed:	Consultant:
Has a geo-technical assessment (if applicable) been completed?		Yes (Attach Report)	No	Year Completed:	Consultant:

Section 3: Capital Cost - ESTIMATE ONLY				
Item	Below Market Units	Market Units / Commercial	Total	
Land	\$ -	\$ -	\$ -	
Planning Studies	\$ -	\$ -	\$ -	
Design Services	\$ -	\$ -	\$ -	
Construction Services	\$ -	\$ -	\$ -	

Project Support Services	\$	-	\$	-	\$	-
Furniture and Equipment	\$	-	\$	-	\$	-
<b>TOTAL ESTIMATED CAPITAL COST</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>-</b>

**Section 4: Funding Sources - ESTIMATE ONLY**

List all expected funding sources below:

Names of Funding Sources	Below Market Units	Market / Commercial	Total
Housing Provider Equity Contribution	\$ 1,300,000	\$ -	\$ 1,300,000
Housing Provider Land Contribution	\$ -	\$ -	\$ -
Private Loan	\$ -	\$ -	\$ -
Expected Federal Loan	\$ -	\$ -	\$ -
Expected Federal Funding Contribution	\$ -	\$ -	\$ -
Requested Provincial Funding Contribution	\$ 450,000	\$ -	\$ 450,000
Provincial Land Lease (if applicable)	\$ -	\$ -	\$ -
Expected Municipal Funding Contribution	\$ -	\$ -	\$ -
Expected Municipal Land Contribution	\$ -	\$ -	\$ -
Private Donation(s)	\$ -	\$ -	\$ -
Other (specify)	\$ -	\$ -	\$ -
<b>*Total Funding Sources</b>	<b>\$ 1,750,000</b>	<b>\$ -</b>	<b>\$ 1,750,000</b>

\*Must equal "Total Estimated Capital Cost" of Project in Section 3.

**Section 5: Preliminary Project Budget - ESTIMATE ONLY**

Unit Type (Select from drop-down menu)							Total
Number of Below Market Units	6	6	6	6	6	6	30
Monthly Rental Revenue per Unit	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 3,000
Total Annual Rental Revenue per Unit Type	\$ 43,200	\$ 43,200	\$ 43,200	\$ 43,200	\$ 43,200	\$ 43,200	\$ 216,000
Average Sq.ft. per Unit Type	1,000	1,000	1,000	1,000	1,000	1,000	
Number of Market Units	0	0	0	0	0	0	-
Monthly Rent per Unit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Annual Rental Revenue per Unit Type	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Average Sq.ft. per Unit Type	0	0	0	0	0	0	
<b>Total Units</b>							<b>30</b>

Which of the following are included in the monthly rent?

Electricity	Cable / Phone / Internet
Heat	Other (specify)
Water & Sewer	

Using the format below, please provide a Project Budget based on a 5-year projection, and the number of units requested.

Forecasted Annual Revenues	Year 1		Year 2		Year 3		Year 4		Year 5	
	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market	Below Market	Market
Rental Structure (select from drop-down menu):	30% of Gross Income		30% of Gross Income		30% of Gross Income		30% of Gross Income		30% of Gross Income	
Rents	\$ 216,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Lodge Requisition (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	
SL3, SL4, SL4D Funding (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	

Lodge Assistance Program (if applicable)	\$ -		\$ -		\$ -		\$ -		\$ -	
Non-residential Rents (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ancillary Revenue (Specify)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal	\$ 216,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Annual Revenue Subtotal	\$ 216,000		\$ -		\$ -		\$ -		\$ -	
<b>Deduct</b>										
<b>Anticipated Annual Vacancy Rate</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Vacancy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Annual Revenue Deductions	\$ -		\$ -		\$ -		\$ -		\$ -	
<b>Total Forecasted Revenues</b>	<b>216,000</b>		<b>-</b>		<b>-</b>		<b>-</b>		<b>-</b>	

Forecasted Annual Expenses	Year 1	Year 2	Year 3	Year 4	Year 5
Administration (Human Resources)	\$ 53,000	\$ 53,900	\$ 55,500	\$ 57,100	\$ 58,850
Property Management Services (if hired externally)	\$ -	\$ -	\$ -	\$ -	\$ -
People Centered Support Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Health Services (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ 24,500	\$ 25,200	\$ 26,000	\$ 26,800	\$ 27,600
Debt Servicing	\$ -	\$ -	\$ -	\$ -	\$ -
Anticipated Bad Debts (e.g. rental arrears)	\$ -	\$ -	\$ -	\$ -	\$ -
Insurance	\$ -	\$ -	\$ -	\$ -	\$ -
Property Taxes	\$ -	\$ -	\$ -	\$ -	\$ -
Replacement Reserve	\$ -	\$ -	\$ -	\$ -	\$ -
Utilities	\$ 40,500	\$ 41,300	\$ 42,100	\$ 43,000	\$ 43,800
Meal Provision (if applicable)	\$ -	\$ -	\$ -	\$ -	\$ -
Other (specify)	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Forecasted Annual Expenses</b>	<b>118,000</b>	<b>120,400</b>	<b>123,600</b>	<b>126,900</b>	<b>130,250</b>
<b>Estimated Annual Surplus/ (Deficit)</b>	<b>98,000</b>	<b>(120,400)</b>	<b>(123,600)</b>	<b>(126,900)</b>	<b>(130,250)</b>

Pease confirm all that apply:      Operating model is self-supporting      No provincial operating funding required      No capital maintenance funding required  
Does the proposal require operating funding?

In the case of a surplus, please confirm the planned use of the operating surplus funds or in the case of a deficit, please confirm how operating expenses will be funded?

Any surplus will be reinvested into the property(s) or returned to the province upon request.

If property taxes are not indicated, please attach supporting documentation as to the municipal property tax exemption.

**Section 6: Additional Information**  
Climate Change (Note: Include any energy savings or environmental considerations or opportunities associated with this project.):

New project (facility) that will be constructed to new codes. This will include increased insulation and wall thickness (compared to 1979/80 codes), and constructed as two or one building to assist reducing heating and power costs (reducing carbon output). One location will assist future management and maintenance, further reducing costs.

**Disclaimer**

Seniors and Housing is a public body subject to the Freedom of Information and Protection of Privacy (FOIP) Act. Records in Senior's and Housing's custody and control may be subject to a request for access to information under the Act. By submitting an application form to Alberta Seniors and Housing, the applicant acknowledges and agrees to the sharing of information collected from the applicant with the Canada Mortgage and Housing Corporation (CMHC) and other Government of Alberta departments. Applicants are strongly advised to consult their own legal advisors as to the appropriate way in which confidential or proprietary business information should be identified in their applications.

**Incomplete submissions or use of previous submission templates will not be considered.**